

Internet Archive Open Libraries Proposal

MacArthur Foundation 100&Change



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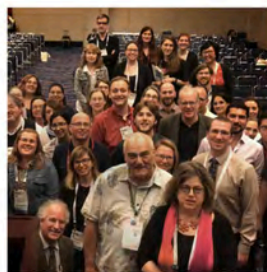
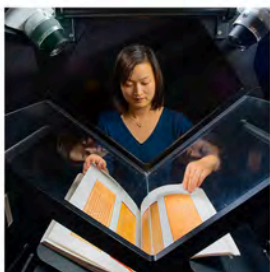
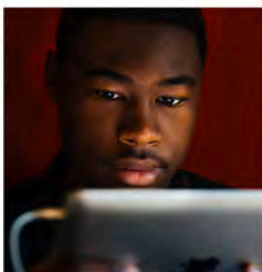
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* Website: <http://openlibraries.online>

A. Overview



Executive Summary

Looking for a trusted source of information? For millions of citizens there's only one place to head: their local library—society's great equalizer, where Wi-Fi, computers, and knowledge are offered for free, to anyone entering the door. Yet, due to distance, time, cost or disability, people in marginalized populations are too often denied access to physical books. Today for many learners, if a book isn't digital, it's as if it doesn't exist. Yet there's almost a century of knowledge still living only on the printed page, missing from our digital shelves.

The Internet Archive's *Open Libraries* offers a solution bringing four million books online, through purchase or digitization, while honoring the rights of creators and expanding their online reach. Added to our existing 2.5 million ebooks, we can build the online equivalent of a great, modern public library. Working with US libraries and Benetech, operator of the world's largest digital library for people with disabilities that impact reading,¹ the Internet Archive (IA) will bring millions of free digital books to billions of people. For the blind, ebooks are a lifeline, yet less than one in ten exists in accessible formats.² Digital content becomes instantly available to people in rural areas, with widely ranging physical abilities. By digitizing millions of books, we unlock them for communities with limited or no access.

At the same time, we have a rare opportunity to shape digital collections serving communities that are increasingly diverse. In 2015, 50% of newborn US babies were children of color,³ yet over a twenty-year span, on average only 10% of children's books contained multicultural content.⁴ Because our library shelves can and must be as diverse as our readers, we will curate inclusive content.



IA will select and preserve diverse collections and help libraries greatly expand their digital holdings. In 2013, ebooks comprised an average of 17% of US public libraries collections;⁵ we can turn 80% of library collections digital by 2023. We'll build a financially sustainable infrastructure for at-scale ebook circulation so US libraries that own the hardcopy can offer their patrons temporary digital access, just like loaning a book. Working with Benetech, we'll expand ebooks for people with disabilities by 10x and share these books across 29 nations through global copyright agreements.⁶

In this era of disinformation, ready access to trustworthy sources is critical. Library books are trusted sources for lifelong learning. By bringing them online, we empower journalists, educators and Wikipedia editors to cite “snippets” directly, grounding readers in the vetted, published record.

A century ago, Andrew Carnegie funded a vast network of public libraries because he recognized democracy can only exist when citizens have equal access to diverse information. Libraries continue to play that vital role, welcoming the whole of society to use their free resources for individual learning, while respecting readers' privacy and dignity. Through its support, the MacArthur Foundation can help us build an enduring asset for libraries across this nation, ensuring that all citizens—including our most vulnerable—have equal and unfettered access to knowledge.

Location for Proposed Project

We will not be conducting any work in nations that have been sanctioned by the US government.

Internet Archive staff members located in the United States will do the primary technology development for *Open Libraries*. We will digitize and re-publish approximately 3-4 million books at Internet Archive-run facilities in the United States, Hong Kong, Shenzhen, China, and possibly at a new center in Asia or Latin America. Book curation teams will be based in the United States with input from accessibility partners in the (currently) 29 nations that have ratified the “Marrakesh Treaty to Facilitate Access to Published Works by Visually Impaired Persons and Persons with Print Disabilities.”¹ Our current dissemination plan for the print disabled begins with India, Canada, and the 12 Latin American nations that have ratified the Marrakesh Treaty: Argentina, Brazil, Chile, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Panama, Paraguay, Peru, Uruguay.² (However, all of our texts will be available to people with disabilities worldwide.)

Through Benetech, we will remediate 10,000+ books to higher accessibility by working with their contractors in India, Laos, and Kenya.



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At the **Internet Archive**, we believe passionately that access to knowledge is a fundamental human right. Knowledge makes us stronger and more resilient; it provides people pathways to education and the means to secure a job. But many people in marginalized communities encounter daunting barriers to knowledge. The Accessible Books Consortium states that for the blind, “the lack of accessible books is a very real barrier to getting an education and leading an independent, productive life.”¹ By harnessing scalable technologies, social entrepreneurial capital, and leaders in the field who support this change, *Open Libraries* seeks to create a lifeline to trusted information by bringing millions of digital books to billions of learners around the world.

How will we do this? Through one of society’s most respected and trusted institutions—the library. In the United States, libraries have long ceased to be places that just lend books. If you haven’t been to a public library lately, you might be amazed. Large crowds stand outside each morning, waiting for the doors to open. Inside there are makerspaces, media labs, and massive open online courses (MOOCs). In U.S. cities, libraries have become front line providers of community services, from free Wi-Fi to literacy campaigns to citizenship classes for immigrants. Surveys show that low-income Americans, Latinos, and African Americans are the most likely to say closing libraries would have a major impact on their lives and communities.² By strengthening libraries we serve the needs of America’s most vulnerable populations.

1 Accessible Books Consortium Bringing books to persons with print disabilities
<https://publishsa.co.za/file/1446643888wec-abc-brochure.pdf>

2 Libraries at the Crossroad Pew Research Center September 2015 <http://www.pewinternet.org/2015/09/15/libraries-at-the-crossroads/>



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The Internet Archive will help to transform the US library system by providing digital delivery of 80% of the average library's collection by 2023, reducing the barriers to information created by distance, time-constraints, cost, and disability. By leveraging this one-time investment in digitization, libraries may save as much as \$3 billion in interlibrary loan fees over the next decade. Ebooks also free up shelf space, allowing librarians to buy new books from publishers and divert their valuable real estate to serve their core mission: to enrich, educate, and empower every individual in our diverse communities.³

Internet Archive's *Open Libraries* project will:

- **CURATE** diverse & inclusive collections
- **INCREASE ACCESSIBLE CONTENT** by 10x for all people with print disabilities
- **SCAN & PROVIDE DIGITAL ACCESS** to books through libraries that own the hard copy
- **ENSURE READER PRIVACY & LONG TERM PUBLIC ACCESS**
- **PRESERVE** millions of books now missing from our digital shelves

Here is our Project Plan: (Please see attached Worksheets)

A. Governance

The Internet Archive has rigorous fiscal policies and oversight to ensure our projects meet deliverables on time and within budget. We have a track record of successfully managing projects of enormous scale and marshalling our resources efficiently. *Open Libraries* will benefit from the guidance and oversight of several governing boards. As reflected in **Section A**, the Internet Archive Board of Directors (#2), our outside auditors (#3), and *Open Libraries*

³ From the Mission Statement of the Los Angeles Public Library: <https://www.lapl.org/about-lapl/about-library>



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25-member Advisory Board (#1) will each meet annually to review the project's progress, and ensure our financial and operational accountability. Our Advisors will form seven working groups in Curation, Accessibility, Technology, Collection Development, Service Plan Development, Legal, and Financial Modeling. These global leaders in finance, law, libraries, and education will greatly inform the way we conceptualize and execute our plans.

Internally, our Finance Team and grant manager will conduct quarterly reviews against our benchmarks (#4-5). As a 501(c)(3), the Internet Archive has successfully completed IRS-required audits since 2006. Governance will be overseen by **Digital Librarian, Brewster Kahle**.

B. Building the *Open Libraries* Team

Internet Archive's staff is comprised of 164 employees and 18 contract employees, and we are in the process of hiring 12 additional staff. For this project we will add 25 new positions over the five-year grant period, a 14% increase. To prepare for this rapid round of hiring, our **Director of Human Resources, BZ Petroff** has spent the last six months implementing new software solutions to streamline our human capital management processes, from recruiting through onboarding. (Petroff has a stellar track record as an HR leader, once overseeing 35 recruitment consultants hiring 700 new employees for Lucasfilm in a single year). She will bring on an outside recruitment firm and one staff recruitment specialist to help us find, attract, and hire talented, mission-driven team members. Our brand: people who are passionate—about their families, their interests, their communities—and bring that passion to their work.

C. Curating Books for Maximum Impact

One of this project's most exciting opportunities is to select which four million books—the equivalent of a major urban public library—to carry

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forward for today’s online learners as well as future generations. We had to ask ourselves: How do you curate millions of books in a way that is inclusive, responsive to the community and transparent? **Section C** outlines our approach. We start with core lists serving diverse segments of our society: K-16 students, public library patrons, people with disabilities, Spanish-speakers. Curation at this scale is mostly about parsing data. Take, for example, how we might derive the College Core list. Our Curator of Books will start by taking the metadata (ISBNs) from a typical mid-size college library collection, and cross it with the Open Syllabus list of the books most-assigned in college classes. We could then run “scripts” to see which of these books are already in IA’s collections. Our curator might analyze the books that remain for overlap with those most widely held by the 16,000 libraries who subscribe to OCLC’s cataloging service. Doing these overlap studies gives us a prioritized wish list of books highly relevant to college students. But computers alone cannot build a good collection. That’s why we are working with the Digital Public Library of America (DPLA), whose Curation Corps of 20 volunteer librarians will help hand-select a total of 100,000 books in Year One, and one million over the life of the project. These experienced librarians will help select titles reflecting our diverse communities (#6).

All of these wish lists will be posted on the new dashboard built by the Digital Library Federation (DLF), along with best practices in selecting culturally diverse books. DLF will lead a transparent process for community feedback. These activities are listed in #8, as the Inclusive Curation Project and overseen by **IA’s Curator of Books**.

D. Book Sourcing—Developing a Pipeline of Books

Selecting the right books is only half the challenge. Next we have to find them. That’s the job of the **Director of Books**: procuring the books on our

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curated lists. We will buy as many ebooks as we can from publishers and authors (#2). Others we will buy from booksellers as hard copies and digitize them. In many cases, libraries will give us an extra copy of the books that they are weeding. Our plan assumes that 585,000 books will come from partners who will pay to have their material digitized (#1). The third category is publishers such as MIT Press who are willing to digitize and lend their backlists (#3), in order to reach more people. Arcadia has agreed to underwrite this effort to digitize the historic output of university presses with a \$1 million grant.

We will also support the many global nonprofits who produce copyright-free books, inviting them to join *Open Libraries* to add their culturally-appropriate, high value texts to our collections (#4). We can ensure that their legacy of rich content is not lost to history or left to the exigencies of commercial services. Our friends at Worldreader got their start in our office space, with just a handful of staff. We hope *Open Libraries* can support the work of all social good organizations providing access to knowledge around the world. Our **Books Business Development Manager** will oversee this scope of work.

E. Technology Plan

Here we broadly outline the technologies we will build or license for *Open Libraries*. Technology development is rarely a straight line, so like any successful plan, we will remain iterative and flexible.

1. *Integrate ebooks purchased from or donated by publishers and authors*

Wherever possible, we will purchase books that have been authored and published in a digital format (ebooks). When policy and agreements allow, these “born digital” works will be added to the overall collection with minimal technical processing.

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2. *Increase book digitization capacity*

The Internet Archive currently digitizes approximately 1,000 books per workday (250,000 per year). This project requires expanding our digitization capacity to peak at 750,000 books in 2020, 2021, and 2022. We will be refining our own hardware, the TableTop Scribe scanner, designed and built by the Internet Archive for this express purpose. Ordering parts, assembling, and testing the hardware requires planning and lead time. Additionally, we may need to refine and expand the capacity of the software infrastructure that helps convert the page images into digital books.

3. *Improve the accessibility of Internet Archive books*

Shifting books into digital formats is the first step to making them accessible for the approximately 10% of all people who have disabilities that impact reading. Once digital, book files can be magnified, automatically read aloud (using synthesized speech), or used with special software, according to the needs of each individual.

As part of our engagement with this community, we have learned that our technology and methods for producing accessible texts can be improved. Consequently, we propose to:

- improve our digitization processes for new materials
- selectively enhance some digitized materials to bring them to a higher level of accessibility

We are already engaging with Benetech (operator of the world's largest accessible library, Bookshare), National Federation of the Blind (NFB), LightHouse for the Blind, US Library of Congress' National Library Service (NLS) for the Blind and Physically Handicapped, Accessible Digital Library of India, Centre for Internet and Society (India), and Learning Ally. For many years we've partnered with the accessibility teams at universities, including the Scholars Portal for Ontario (led by the Accessibility Librarian for

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University of Toronto Libraries), and the Accessible Media Services group at the University of Illinois.

4. *Improve the accessibility of our websites and bookreader*

Our plans include assessing the accessibility of our websites, archive.org and OpenLibrary.org. Where necessary, we will improve the websites to support better engagement, working closely with our partners who have deep experience serving in the practical needs of learners with disabilities.

5. *Increase circulation of ebooks to global communities of people with disabilities*

This project makes books accessible and available to individuals with disabilities under current laws and treaties. Delivering to print-disabled populations requires both good-quality digital versions of materials (ebooks) and establishing the partnerships and distribution systems essential to getting these ebooks into their hands and reading devices.

There are three significant areas and phases for this expansion:

a. *Work with US providers of services to the blind to authorize large-scale access*

In the United States, there are several organizations chartered to provide accessible reading materials to blind and print-disabled communities, each with a significant user base and distinct online portal. The Chafee Amendment (Section 121 of the Copyright Act⁴) enables us to offer full download of any in-copyright text to any person with a certified print disability. We are working with the top four US organizations to authorize their members for full access to our millions of books.

We are partnering with teams from Benetech, the Library of Congress National Library Service (NLS) who operates Braille and Audio Reading Download (BARD), Learning Ally, and the National Federation of the Blind.

⁴ 17 U.S. Code § 121 - Limitations on exclusive rights: Reproduction for blind or other people with disabilities
<https://www.law.cornell.edu/uscode/text/17/121>

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A first step requires integration with each organization's user authorization system, allowing IA to recognize any print-disabled user member and authorize them to access any of our digitized texts in a format appropriate for adaptive devices. These organizations have already provided technical information and offered to help connect their user bases to archive.org. If you combined the top three accessible libraries in the United States, the size of the combined collection would be approximately 699,000 titles (538,000 at Benetech, 81,000 at NLS, and 80,000 at Learning Ally) and that aggregation certainly includes significant overlap. We propose bringing more than 6.5 million titles to this community of users, offering them the breadth and depth of topics, authors, and experiences enjoyed by those without the same disabilities. Our plan also includes working with Benetech to bring a special collection of 10-15,000 highly requested books to even fuller accessibility.

b. Expansion to selected Marrakesh Treaty ratifying nations

With digital books, we can serve blind communities far beyond the US borders. The Marrakesh Treaty⁵ enables ratifying nations to share published materials with each other. The provisions are currently being considered by the US Congress, however Canada has already ratified this global intellectual property treaty. The Internet Archive Canada will engage with targeted Marrakesh signatories to make digitized books available to their print-disabled communities. We will begin in India, home to the world's largest blind population.

c. International expansion to Marrakesh nations on a regional basis, starting with Spanish-speaking countries of Central and South America.

We will support our partner, Benetech, to create and publicize a regional, language-centric portal for integration with organizations serving the blind

⁵ World Intellectual Property Organizations, Marrakesh Treaty http://www.wipo.int/treaties/en/ShowResults.jsp?lang=en&treaty_id=843

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of any Spanish-speaking Marrakesh nation. This portal will serve Spanish-speaking nations in Central and South-America (12 of which have ratified the Marrakesh Treaty) and ensure the bidirectional sharing of all digital books, including and especially those available in Spanish. Ten of the 12 nations do not have any national body serving the needs of people with print disabilities. This portal will fill an enormous gap.

6. *Expand circulation and lending capacity*

Through OpenLibrary.org we have six years of experience lending digital books on behalf of 100+ partner libraries. This project proposes to expand significantly the infrastructure and services required to bring the collections of thousands of libraries online for lending, using tools that can be managed by the libraries themselves.

Our partners have made it clear: they need a turnkey solution that requires minimal technical investment on their part, so IA is developing a web-based portal that allows for easy collection curation by library administrators. Further, we will work to help integrate digital books with libraries' existing discovery systems, such as online card catalogs, subject collections, and lists of staff favorites.

To help augment libraries' existing digital lending programs, we will also build circulation systems for careful control over digital access. We will staff a partnership support team providing library staff with the necessary training for initial setup and ongoing curation.

7. *Enable hyperlinks in citations to resolve to snippets of text*

In a time of growing disinformation, knowing your sources really matters. Ideally all books cited in Wikipedia, educator's lesson plans, and in news and journal articles would become hypertext links to those books, allowing the reader to click and open to the right passage or "snippet" for easy consumption. If readers want to read more, then they may need to borrow the book, a process we will attempt to simplify. By weaving large swaths

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of published works into the web itself, we will be fulfilling one of the great promises of the hypertext web, to link concepts directly to their sources.

We will work toward this goal by creating stable URLs for pages into books, build translation tools for standard footnote formats to those URLs, and then work with Wikipedia, OER Commons, and others to integrate these new capabilities into editors’ workflows.

Since 2013, we have worked with Wikipedia communities to automatically “heal” more than two million broken links in their articles, replacing them with links to the original page that we’ve archived in the Wayback Machine. Working with the 286 disparate communities⁶ that make up Wikipedia has taken time, but we feel confident we can achieve integration with *Open Libraries’* books as well.

8. *Enable research use of the digital book dataset*

A digital repository of more than four million books and related metadata creates a data set of great interest to researchers and data scientists. Researchers may derive significant scholarly benefit from analyzing data at this scale—such as the analysis of linguistic patterns or AI-enhanced analysis of historical trends.

We will enable what our profession calls “non-consumptive” research use—research that does not include reading a book or displaying large portions of in-copyright texts, but performs computational analysis of book data. Realizing this outcome will require us to build secure procedures and appropriate hosting that supports “bulk access” to book data at scale.

F. Building Partnerships with Key Stakeholders

We will achieve scale and impact by building partnerships throughout the

⁶ Wikimedia Foundation, List of Wikipedias https://meta.wikimedia.org/wiki/List_of_Wikipedias

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entire ecosystem of libraries. That requires validation and support from key stakeholders. It means engaging in a community-centric process to design tools and services. This process is being led by **Director of Partnerships, Wendy Hanamura** and **Sr. Strategist, Jim Michalko**. As outlined in **Section F**, we've secured early endorsements from key stakeholders (#6). The boards of the largest associations representing libraries—the American Library Association (ALA), Public Library Association (PLA), and Chief Officers of State Library Agencies (COSLA)—support this effort. So do many authors and publishers. We are working with the Authors Alliance and MIT Press to align around our common goal: creating a new generation of readers and critical thinkers who love books.

Our scaling strategy involves engaging innovators from a broad range of archetypes to serve as first movers, championing *Open Libraries* within their associations and networks (#5). Our first calls were to educators and knowledge providers (#3) in the movement to adopt Open Educational Resources (OER). They will connect our resources to the learners who need them most—students who cannot afford textbooks, veterans getting their GEDs, and independent scholars who don't have the resources of a major university.

Our partners are building this service side-by-side with us. These include the curation specialists at the Digital Public Library of America (DPLA), the Digital Library Federation (DLF), and Benetech, operator of the world's largest accessible library, serving people in 70 countries (#1). We will see network effects when we integrate with the technologies of key service providers (#4) that already support thousands of libraries around the world. Likewise, we can reach millions of people with print disabilities by integrating

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services with the leading organizations in that sector (#2).

G. Establishing Legal Frameworks and Agreements

The goal of *Open Libraries* is to forge a path that honors the rights of creators and expands their online reach, while serving the compelling interests of society, especially our most marginalized communities. As Georgetown’s Associate Dean, Michelle Wu, explained in her presentation to MacArthur Foundation staff, “I’m here to address the lack of understanding about copyright law that I think has held libraries back for decades. Many do not realize that Congress enacted equally strong protections for society by way of fair use, which recognizes that under certain conditions, actions that would be copyright infringement are permitted as equitable and in the public interest.” Clarifying this legal framework for the entire ecosystem of university counsel, public library leaders, authors, and publishers would be a major contribution to society. Without it, we are stuck in false opposition, afraid to challenge the status quo, poorly serving the interests of learners of every hue.

We have now gathered a cadre of library leaders willing to share the risk of legal opposition in order to move society forward. Refining a common understanding of fair use and digital library lending is a fundamental step to legitimizing this transformational system-wide change.

In May, our advisor, Pam Samuelson, one of the nation’s preeminent copyright scholars, came to us with a proposition. She offered to convene a day-long meeting with 20 of America’s most respected fair use experts. They would consider our plans, offer guidance about fair use in general, and form a working group willing to craft a joint statement for others to consider. This work is now in progress with plans to continue to gather the working group annually (#2) and disseminate their joint statement through events such as

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“Fair Use Town Halls,” proposed by Harvard University copyright advisor, Kyle Courtney, as part of his global Fair Use Week activities in 2018 (#1). This critical area of work is led by **Internet Archive’s legal counsel, Lila Bailey**, who has spent her career defending the reader’s rights to privacy and specializing in digital copyright law.

H. Establish Systems to Inventory, Track, and Store our Physical Assets

For the Internet Archive, reducing costs means controlling the supply chain at every point of the process. That’s why we invented our own scanners, run our own data centers, and even staff our own warehouses—two facilities in Richmond, CA. We are developing systems to ensure the efficient preservation of millions of books for the long-term, under the leadership of **Director, Kelly Ransom**.

I. Researching, Testing, and Validating Financial Sustainability Models

Even before we start, the Internet Archive and our evaluation partner, New Knowledge, are planning how to sustain and grow the *Open Libraries* assets. Preservation is one of our most critical goals, and sharing the assets across a wide network of libraries is one of our fundamental strategies. As our advisors, LOCKSS founders, Victoria Reich and David Rosenthal would attest, “*Lots of Copies Keep Stuff Safe*.”

The good news is that this project provides for the long-term file maintenance and storage of millions of books. That means we are committed to serving the files in myriad formats in decades to come, just as we do now for billions of web, video, audio, and software files. Planning for the long-term is part of our DNA.

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In the library world, OCLC is among the most adept at turning cooperative library services into self-sustaining businesses. They've done this for digital card catalogs, interlibrary loans, and now perhaps for e-delivery of the books themselves. We will work with OCLC to (#1) conduct market research and draft business plans for three business opportunities we've identified. Based on the results, we will pilot the most promising models (#2). If the pilots prove to be successful, we will refine our plans and launch a fee-based service (#3) to provide a sustainable source of revenue for the legacy phase of this project. These explorations will be led by our **Books Business Development Manager**.

IA has launched and runs two successful fee-based services: our web archiving business, Archive-It, and our book scanning services offered at 20 locations around the world. (See Financial Strength and Stability section.)

J. Training and Library Support

Our web archiving service, Archive-It, deploys a team of partner specialists—both librarians and engineers—who work with 500 partners for onboarding, training, and remediating glitches in the system. They run an efficient, supportive, community-oriented service, that emphasizes partnership over profit. With *Open Libraries* we will emulate our web team's model of training and support (#1-2). We will create online resources and tutorials to reduce the costs of direct customer service (#3). This effort will be led by our **Partner Support Manager**.

Over the last decade, our Books Team has successfully served more than 1000 contributing libraries who worked with us to scan their collections. We are digitizing the books of 272 active partners across 20 scanning centers today. Expanding to a digitize-and-lend service is a natural evolution of our model of financially sustainable social entrepreneurship.

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**K. Measurement & Evaluation for Accountability, Feedback,
and Recalibration**

In selecting partners for measurement and evaluation, we searched for several things. We looked for team members who are whip-smart, data-driven, and who know the landscape of libraries well. We wanted our efforts to help not only the Internet Archive, but the entire library ecosystem, which is transitioning through radical technological change. If we were going to devote a substantial part of the budget to these activities, we hoped to leave behind an enduring asset that lives beyond the five-year project span. Thanks to program officers at the Bill and Melinda Gates Foundation, who have run the Global Libraries division for two decades, we were introduced to our two measurement and evaluation teams.

Leading our evaluation team is the New Knowledge Organization, directed by social scientist, Dr. John Fraser, and guided by Beverly Sheppard, former director of the Institute of Museum and Library Services (IMLS). We appreciated that they have been instrumental in creating strategies for the ALA and PLA on measuring the impact of libraries' public programming. Fraser is also the Editor-in-Chief of *Curator: The Museum Journal*, a Tier 1 journal published by Wiley; he has witnessed first hand the journal world's rapid shift to e-delivery. Understanding the intersection between publishers and libraries may be critical to our success. New Knowledge is designing a process that will challenge our direction at key intervals and help us to remain responsive, iterative, and true to our impact goals (#2).

Joining them are two research centers within the University of Washington's (UW) Information School: the Technology and Social Change (TASCHA) group and the DataLab. As the Gates Foundation winds down its Global Libraries program in 2018, it invested in three legacy partners, giving them



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each a decade of funding to create a “strong and resilient” library field. TASCHA is one of those three, working to support libraries as they transform into “critical centers of learning, creativity, and community development.” Joining them are the data scientists of the DataLab, led by Dr. Carole Palmer. We believe the University of Washington Information School is strategically placed to “direct and influence the practice of librarianship and the role that libraries must play in the lives of people and communities in the 21st century,” as Dean Harry Bruce writes in his letter of commitment to this project.

We’ve asked TASCHA and the DataLab to create the **Impact Data Trust**, a transparent, public repository for library user data to be stored in the Internet Archive (#1). By aggregating use data from IA and all its partners, data scientists can glean more accurate analyses, not only for us, but for the field. The idea for this trust came from IA Advisor, Dr. Susan Hildreth, former director of IMLS and Professor in Practice in UW’s Masters of Library and Information Sciences (MLIS) program. She knows that libraries have long desired a trusted place to aggregate data, in order to see the big picture and make compelling cases to agencies that fund them. But librarians also require the highest ethical standards around reader privacy. Dean Bruce writes about this project hitting a “sweet spot” where data scientists and library practitioners can “leverage data for the social good, in an ethical manner that can inform policy and impact lives for the better.” That is indeed our goal.

TASCHA will work with New Knowledge to convene a yearly meeting of practitioners to share their data-driven insights (#3) and explore field-wide understanding of how *Open Libraries* is shifting use and access. The results of these meetings will inform our decisions in awarding evaluation sub-contracts to field-specific experts to conduct focus groups, surveys, and research that respond directly to questions as they arise. This plan

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focuses on three goals: accountability to our targets (#1), ongoing data-driven feedback for quick course correction (#2), and producing data-driven lessons that strengthen not only us, but the entire ecosystem we serve (#3).

L. Outreach and Marketing to Key Influencers and Communities

While we work each day with technology, libraries, and books, it is people who are the heart of our project. Among them are half a billion people with disabilities that impact reading, the two-thirds of Americans who have library cards,⁷ the 42 million people who have read a book online at one of our websites, archive.org and OpenLibrary.org in the last six months alone, another 319 million IA patrons who downloaded the text to read on their own devices in 2017, and above all, there are the individuals, who are enriched, educated, and empowered by the trusted information safeguarded by our libraries.

To capture the spirit and purpose of *Open Libraries*, we are launching OpenLibraries.online (#1), a website highlighting a few of these first person stories. We didn't have to go far. Every day our patrons send us their real life experiences. We talked to our mothers, our children, and our colleagues—all of whom will explain to you firsthand why having knowledge at their fingertips is so important. How ebooks have been game changers for them. How the public library is their only technical access point, and how having ebooks there that reflect their own stories makes all the difference between feeling included, or shut out.

Today, a lot of people think that Amazon has made libraries obsolete. But for-profit platforms including Google and Amazon make no guarantees

⁷ American Library Association, Library Cards: Home
<http://libguides.ala.org/librarycards>

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about reader privacy, long-term public access, or preserving the best books produced by humankind. As John Palfrey writes in his book, *BiblioTech: Why Libraries Matter More than Ever in the Age of Google*, “Librarians worry, with some reason, about what protections readers will have when the police come calling for information about the books they have checked out...Their fear is justified: for-profit firms may not stand as firm as libraries would in the face of state pressure.”⁸

So we need to remind Americans why libraries matter and that our world is split by an informational divide. We’ll do that with our first digital media campaign, “Everyone Deserves to Learn,” a primer in the ways ebooks can be lifelines for certain readers (#2). We will follow that with a second campaign, “Inspired to Lead,” about the remarkable leaders who took a stand after internalizing a lesson they discovered in a book. Librarian of Congress, Carla Hayden, often quotes Frederick Douglass who said, “Once you learn to read, you will be forever free.” “If you can absorb information yourself and make your own decisions, that’s a freedom,” Hayden explains.⁹ In the midst of the Baltimore riots protesting Freddie Gray’s killing, Hayden made her own decision: to keep a branch of her library open as a refuge. The power of an idea gleaned from history, translated into action. In the right hands, that is what a book empowers.

Our third campaign will engage directly with the public, encouraging them work with us to make this digital equivalent of a “great public library” a collective endeavor.

⁸ John Palfrey, *BiblioTech: Why Libraries Matter More than Ever in the Age of Google*, (New York: Basic Books, 2015), 204

⁹ Hayden, Carla. “Carla Hayden Thinks Libraries Are a Key to Freedom.” *The New York Times*, January. 19, 2017 <https://www.nytimes.com/2017/01/19/magazine/carla-hayden-thinks-libraries-are-a-key-to-freedom.html>



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Finally, our team members are fanning out far and wide to share the *Open Libraries* story (#3). We start this August in front of 2000 Wikipedians in Montreal and move on this Fall to 1800 librarians and publishers in Charleston. Throughout the next five years, we'll be telling our story, listening to our stakeholders, learning from our setbacks, and staying laser-focused on our mission:

When *Open Libraries* is complete—

...access to knowledge will be more evenly distributed, especially to people in marginalized communities around the globe.

...the US library system will be transformed, offering nearly equal numbers of ebooks and hard copies, freeing up space and money so librarians can spend their resources providing critical services to patrons.

...the ebooks on library shelves will look more like the people who read them.

...a century of missing books will be preserved, held in dozens of institutions across borders.

...people in search of information they can trust will find it in the place they've always trusted: their local library.

Open Libraries Project Plan

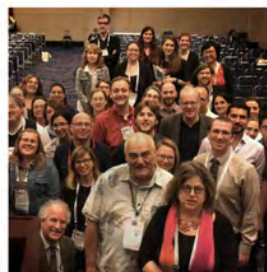
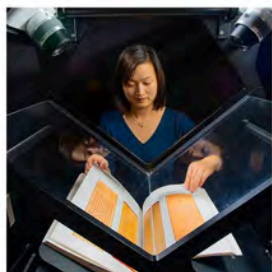
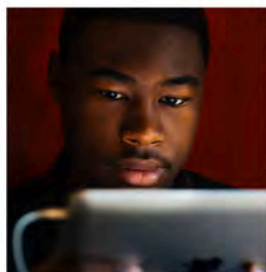
Summary View

Task Name	Duration	Start Date	End Date	Assigned To
1 FIVE-YEAR PLAN FOR OPEN LIBRARIES A Project of the Internet Archive				
2 A. Governance: Establish teams for guidance, accountability, reporting	1540d	10/11/17	09/05/23	Brewster Kahle
3 1. Establish Advisory Board in seven categories: Tech; Curation; Collection Development; Legal; Service Plan; Accessibility & Financial Modelling	1313d	10/11/17	10/21/22	Wendy Hanamura
11 2. Internet Archive Board Review Scheduled	1041d	12/07/18	12/02/22	Jacques Cressaty
17 3. Internet Archive External Audit scheduled	1113d	06/01/19	09/05/23	Jacques Cressaty
24 4. Internal Grant Financial Management Quarterly and Annual Reviews	1272d	04/16/18	02/28/23	Scott Fong
45 5. MacArthur Grant Report & Internal Assessment (Half-yearly)	1208d	05/21/18	01/04/23	Grant Manager
56				
57 B. Hire team to execute Open Libraries	1221d	05/01/17	01/03/22	BZ Petroff
91				
92 C. Curation	1305d	01/01/18	12/30/22	Curator of Books
93 1. Establish College Core List	1220d	04/30/18	12/30/22	Curator of Books
98 2. Establish Public Library Core List	1220d	04/30/18	12/30/22	Curator of Books
102 3. Establish Bookshare List for People with Print Disabilities	1304d	01/02/18	12/30/22	Curator of Books
107 4. Establish Most Widely Held by Libraries List	1240d	04/02/18	12/30/22	Curator of Books
112 5. Establish Wikipedia Books List	1096d	10/19/18	12/30/22	Curator of Books
117 6. DPLA Curation Corps selects 1M books for K-16 Education & Diversity	1302d	01/01/18	12/27/22	Curator of Books
170 7. Curate List for People with Disabilities in Marrakesh nations	783d	01/01/20	12/30/22	Curator of Books
174 8. Digital Library Federation (DLF) leads Inclusive Curation project to oversee diverse selection with community feedback	1304d	01/01/18	12/29/22	Bethany Nowwiskie
230				
231 D. Book Sourcing—develop books pipeline for purchase and digitization	1175d	07/02/18	12/30/22	Director of Books
232 1. Negotiate scanning agreements with partners for Super Scanning Centers (e.g.--Univ. of Alberta; Northeastern)	180d	01/01/19	09/09/19	Director of Books
236 2. Negotiate terms of purchase with publishers, vendors, authors, booksellers	1044d	01/01/19	12/30/22	Books Business Development Manager
242 3. Negotiate with University Presses and other publishers to digitize their backlist books	522d	07/02/18	06/30/20	Books Business Development Manager
243 4. Create a pipeline for quality, open access books by global NGOs	1044d	01/01/19	12/30/22	Director of Books

Task Name	Duration	Start Date	End Date	Assigned To
244				
245 E. Technology Plan	1566d	01/01/17	12/30/22	
246 1. Integrate purchased eBooks (from publishers, authors, etc.)	1304d	01/01/18	12/29/22	
247 + 2. Scale Book Digitization Capacity in Scanning Super Centers	1566d	01/01/17	12/30/22	Head of Digitization
254 3. Improve Internet Archive books for use by people with print disabilities(e.g. OCR, chapters, formats)	720d	05/01/17	01/31/20	Hank Bromley
255 4. Improve accessibility of web site for patrons with print disabilities	360d	06/01/18	10/17/19	Brenton Cheng
256 + 5. Increase circulation of ebooks to US and Global blind and print disabled communities	1128d	09/03/18	12/28/22	Brenton Cheng
260 6. Develop and implement technology for Circulation and Lending (e.g. OPDS, ILS and OPAC integration)	1179d	01/01/18	07/07/22	Brenton Cheng
261 7. Integrate capability to cite directly from IA's ebooks with top sources for online information (e.g.--Wikipedia, OER Commons, etc.)	923d	06/01/19	12/13/22	Brenton Cheng
262 8. Enable (non-consumptive) Research Use of the Digital Book Dataset	360d	06/01/18	10/17/19	John Gonzalez
263				
264 F. Build Partnerships with Key Stakeholders	1480d	05/01/17	12/30/22	Wendy Hanamura
265 + 1. Build Curation Partnerships	1298d	01/02/18	12/22/22	Wendy Hanamura
270 + 2. Secure Support and Guidance from Organizations Serving People with Disabilities	1274d	01/02/18	11/18/22	John Gonzalez
276 + 3. Secure Support and Guidance from Partnerships for Education & Open Knowledge	120d	01/02/18	06/18/18	Mark Graham
280 + 4. Engage with Technology Providers	1305d	01/01/18	12/30/22	John Gonzalez
291 + 5. Engage Early Adopters & Archetype Innovators	1302d	01/02/18	12/28/22	Jim Michalko
301 + 6. Establish network of Key Influencers in Library Ecosystem	243d	05/01/17	04/04/18	Jim Michalko
309				
310 G. Establish Legal Frameworks and Agreements	1461d	05/23/17	12/27/22	Lila Bailey
311 + 1. Create group of Copyright Scholars to advise on legal framework for D&LS	1413d	05/23/17	10/20/22	Lila Bailey
316 + 2. Legal Working Group continues to expand scholarship, disseminate learnings in wider ecosystem	1045d	10/19/18	10/21/22	Lila Bailey
322 + 3. Create contracts and legal guidelines for compliance with Copyright in D&LS	1297d	01/08/18	12/27/22	Lila Bailey
325				
326 H. Oversee Physical Storage, Inventory and Tracking of assets	1305d	01/01/18	12/30/22	Kelly Ransom
327 + 1. Establish staffing, intake systems, pallet tracking plans to store 3+ million books	1305d	01/01/18	12/30/22	Kelly Ransom
333				
334 I. Financial Sustainability Model	1030d	08/30/19	08/10/23	Books Business
335 + 1. Conduct Market Research and draft Business Plan for earned income from D&LS	240d	08/30/19	07/30/20	Books Business Development Manager

Task Name	Duration	Start Date	End Date	Assigned To
340 2. Pilot most promising option(s)	240d	07/31/20	07/01/21	Books Business
343 3. Launch Service of most promising pilot	200d	07/02/21	04/07/22	Books Business
344 4. Analyze sustainability model for D&LS based on pilot market data	90d	04/08/22	08/11/22	Books Business
345 5. Continue to build fee-based service into sustainable source of revenue	260d	08/12/22	08/10/23	Director of Books
346				
347 J. Training and Partner Support: create systems to on-board, train and support Library Partners	657d	07/01/19	01/04/22	Partner Support Manager
348 1. Build Partner Support Team	657d	07/01/19	01/04/22	BZ Petroff
353 2. Create plan for partner support, growth & sustainability	120d	07/01/19	12/13/19	Partner Support Manager
355 3. Create materials for training and service	360d	01/07/20	05/24/21	
359				
360 K. Measurement & Evaluation for accountability, feedback and recalibration	1295d	01/05/18	12/22/22	Director of Books
361 1. Create and run the Impact Data Trust (Trust)	1285d	01/06/18	12/08/22	TASCHA
395 2. Metrics, Evaluation and Reporting	1295d	01/05/18	12/22/22	New Knowledge
483 3. Community Engagement with Open Libraries' Learnings: Data Mobilization Discussions hosted by UW I-School	1128d	05/18/18	09/13/22	TASCHA
506				
507 L. Outreach and Marketing to Key Influencers & Communities	807d	06/01/17	07/03/20	Wendy Hanamura
508 1. Launch Project website: OpenLibraries.online	97d	06/01/17	10/13/17	Alexis Rossi
509 2. Digital Media Campaigns for Public engagement	807d	06/01/17	07/03/20	Communications Manager
513 3. Public Presentations to Key Influencers & Communities	101d	06/24/17	11/10/17	Brewster Kahle
519				

B. Community Engagement



Stakeholder Identification

At the Internet Archive we are a conduit connecting learners with the published works of humankind. Like the internet itself, we're part of the infrastructure delivering the power of ideas to knowledge seekers and providers. Who benefits from the free flow of ideas? Who has a stake in keeping the power going?

Just about everyone.

Open Libraries will empower **119,000 US libraries**: academic and public library systems, along with the **373,000 library professionals** and associations who serve them.¹ Surveys show when a library offers ebooks, more patrons visit and more books circulate,² but ebooks represent only 17% of their holdings.³ Meanwhile, libraries are bursting at the seams—pressured to preserve ever growing numbers of books, while opening up spaces for public programming. Ebooks enable efficient preservation and community-centric spaces.

Content creators have a huge stake in seeing their works bought and read. Some **authors and publishers** have joined *Open Libraries*, to extend their online reach. The Author's Alliance writes, "Keeping valuable knowledge and creativity out of the reach of readers benefits no one. For authors, the lack of an online version of their books can be tantamount to oblivion."⁴ Other authors and publishers, along with their trade associations, question the idea that libraries' digital lending is fair use. We acknowledge that tension, but believe we can demonstrate that Open Libraries controls circulation in ways greatly benefitting readers without harming creators.

People with disabilities are stakeholders and beneficiaries of our project. They describe a great global "book famine"⁵ and say this effort would open the doors to a world-class accessible digital library.

Educators, journalists, scholars and Wikipedia’s 116,000 active editors worldwide⁶ all share a stake in preserving public trust in information during this “Post-Truth” era. Our project links information to the trustworthy vetted sources directly in books.

And the beneficiaries?

Every **school, university or public library patron**, including the people who physically visit public libraries 1.5 billion times a year.⁷

More than a **billion people with print disabilities**, including **285 million with visual impairments**.⁸

Online readers whose habits are increasingly monitored and monetized. Librarians staunchly defend reader privacy in stark contrast to for-profit alternatives.

Underserved communities in the US, who will see books reflecting their own lives in libraries.

Wikipedia readers who view **15 billion pages** every month.⁹

College students who could replace costly textbooks with Open Educational Resources, saving on average an estimated \$1000 or more per year.¹⁰

Scientists using computational analysis of books’ data to fuel discovery.

Authors whose creative output will be discovered by future generations. As historian, Abby Rumsey, writes, “In 20 years, if a collection cannot be discovered through a web search, people will effectively not know it exists.”¹¹

American Democracy which cannot flourish without informed citizens.

Ultimately, we all have a moral stake in connecting the citizenry to freely-accessible knowledge. As Georgetown Law’s Michelle Wu writes, this project “holds the promise of bridging one of the most dangerous divides of our time: an informational divide caused by the growing economic inequality in the United States.”

Inclusiveness

We know that access to knowledge is not evenly distributed. Surveys show that for many marginalized communities, distance, time, cost, and disability pose barriers to knowledge.¹ *Open Libraries* seeks to eliminate those barriers through e-delivery of the critical information locked in books. Working with the National Federation for the Blind (NFB), Benetech, and others, IA will enable people with print disabilities around the world to access a collection of **6.5M ebooks—10x the size of the world’s largest accessible library today.**

A 2015 Pew survey reveals “lower-income Americans, Hispanics, and African Americans are more likely to say that libraries impact their lives and communities than other Americans.” The most frequent library visitors are Hispanics: 21% say they go to the public library at least once a week, versus 14% of all respondents.² Thus, increasing libraries’ e-resources and communal spaces will have outsize impact for these communities.

For readers at the 80% of public libraries that are small and rural,³ we’ll expand access to more ebooks, **from an average of 17% in 2013 to 80% in 2023.** This enables anyone with an internet connection or mobile device to access a wider range of library information, at any time, from anywhere.

Finally, like many institutions, US libraries have helped perpetuate discrimination—sexism, racism, classism—by curating collections based

on values and norms that reflect the biases of the majority population. We'll curate digital collections as diverse as our readers through a transparent, inclusive selection process, with public feedback loops from diverse community panels.

Persons With Disabilities

Less than 10% of published works can be read by people with viewing impairments.¹ To address this book famine, we're teaming with Benetech to produce 10-15,000 fully accessible member-requested books.

Benetech will use its long-tail user data to create lists of books tailored to the needs and desires of people with disabilities. Then we'll post these lists on the Digital Library Federation's dashboard, inviting public feedback. We believe this transparent, community-responsive process can serve as a model for selecting more inclusive collections everywhere.

Our most ambitious plan ensures that everybody in the world with a qualifying disability can access both the IA and Bookshare platforms in a pay-what-you-can model; for most, access will be free. Benetech will launch a Latin American accessible book portal in the 12 Marrakesh Spanish-speaking nations—10 of which have no accessible ebook platforms at all.

We're partnering with organizations worldwide to provide one-click authorization for their certified print disabled members on archive.org, allowing them to download 6.5 million books in formats compatible with adaptive devices. The Accessible Digital Library of India will deliver these ebooks to the world's largest blind population.

Together, the e-collections of these organizations now total 699,000 accessible books—akin to a small college library. We can increase that collection 10x—providing them with the equivalent of a major urban public

library. As the president of the National Federation of the Blind wrote, this project “constitutes the greatest single increase in accessible materials for the blind since... 1931.”

Stakeholder Engagement

At our 2015 Library Leaders Forum,¹ we asked 80 partners this provocative question: *What if IA could wave a wand over your collections and make them digital? Would you lend them in keeping with traditional practices?*

Many agreed it would transform their libraries, unlocking the true value of their collections. But they were concerned they couldn’t explain this conception of fair use to their lawyers.

Library law panelist, Mary Minow, walked us through fair use’s application to controlled digital lending (CDL); Georgetown Law volunteered to launch the first pilot.

University of Alberta’s Gerald Beasley came away inspired, working to clear a path to digitize 500,000 modern books later this year.

In 2016, Georgetown’s Michelle Wu, published her groundbreaking article,² detailing the legal framework for *Open Libraries*. Meanwhile, Kahle travelled the world, sharing our vision with dozens of CTO’s, university leaders, and librarians. Interest was building.

But the costs, the lack of infrastructure, and potential risks made progress slow. We knew creators might question this project, so we began directly engaging with authors and publishers, answering their questions. Authors Alliance members signed on, and we’re digitizing their books for open access. MIT Press Director, Amy Brand, wanted to take control over her titles, after discovering thousands were circulating unauthorized on the web.

MIT Press became the first publisher to digitize-and-lend its backlist. The philanthropy Arcadia pledged \$1M to bring on other publishers.³

Meanwhile, our idea took hold at Boston Public Library, owners of the full trade collection of Houghton-Mifflin (HM). HM's Archivist convinced her president to digitize-and-lend their backlist, emphasizing in their MOU that "accessibility to all published literature is possible while still protecting the rights of authors, illustrators, designers and publishers."

In 2016, momentum continued with Kahle presenting "Transforming Our Libraries into Digital Libraries"⁴ to 90 leaders. We were invited to lunch with the new Librarian of Congress, Carla Hayden, seeding interest at the world's largest library.

We're now in dialogue with the Author's Guild to ensure them of the strict circulation controls this framework offers, seeking common ground. Remember that as recently as 2012, publishers weren't licensing any ebooks to libraries. The ALA played a pivotal role brokering consensus then, and we've asked their board to consider doing the same for digital lending now.

This year alone, IA teams have met with 1000 librarians, educators, Wikimedians, and legal experts. We've solicited feedback at DPLAFest, WikiCite, and the ALA Annual, where we received key endorsements from ALA and the PLA boards. (See Evidence.)

Media coverage continues to grow, including *EDUCAUSE Review*, *Library Journal*, and BBC. We're engaging the public through FacebookLive and YouTubeLive. Every week books from our wish list arrive, donated by Book Mooch members.



Public libraries are embracing *Open Libraries*, driven by their pressing needs for space and funds. You'll read letters from 35+ influencers and partners. After several years, *100&Change* has started a groundswell. Today we have the technology, buy-in from key leaders, and perhaps, with support from MacArthur, all the prerequisites for transformational change.

Stakeholder Influence

Through deep dialogue with learners, advocates for the blind, and engineers, we're discovering how better to serve the wide-ranging needs of people with disabilities. Since 2010, IA has been providing books in DAISY format and text-to-speech in our bookreader. But the community has told us that this is out-of-date. We now plan to improve accessibility of the navigation within books and produce more up-to-date formats, with consultation from LightHouse for the Blind and Benetech.

Our partners were clear about another point: reduce friction for their members. They're requesting one-touch authorization using their member databases, seamless integration with existing tools, and interoperability with the vendors they already employ. Many statewide library consortia plan to use New York Public Library's new mobile bookreader, *SimplyE*,¹ so we're integrating a seamless flow of our ebooks into this device. Fewer silos, more coordinated efforts.

We were surprised to learn that space is one of the biggest concerns for our early adopters. Many cities impose strict policies around weeding books, so libraries are renting expensive off-site storage for older titles. Storing books more compactly, while providing digital access to them will solve many problems for library budgets, space, and preservation. Counter to our assumptions, this suggests starting with the oldest post-1923 titles and working forward.

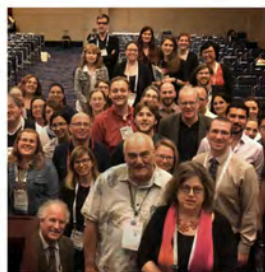
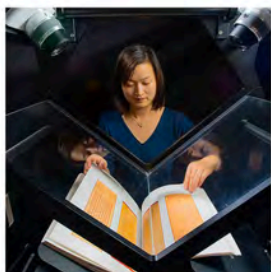
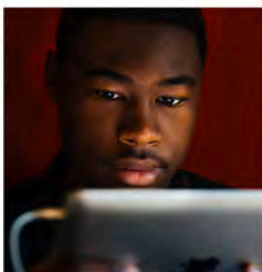
We approached the Digital Library Federation as a partner because of its explicit social justice mission. They have intentionally built a diverse membership of librarians who volunteer time to develop best practices around inclusion. It was DLF who suggested the “Inclusive Curation” methodology--a transparent, community-responsive process that we will be adopting. We’re learning from our partners at DLF everyday.

To truly serve global communities we need boots on the ground and community leaders at the table. With guidance from *Whose Knowledge?*, we are adding advisors in India, who are tying us to the on-the-ground networks with the most momentum.

In response to feedback from 20 top copyright experts, we are shifting our service plans and timelines. It makes sense to move swiftly to digitize and offer millions of the most useful ebooks to the print disabled, where copyright exemptions are clear-cut. Similarly, we can move forward with journalists and Wikipedians to ground their articles in citation “snippets.” We’ll increase efforts to buy ebooks directly from publishers and build partnerships with them akin to our understanding with Houghton-Mifflin-Harcourt. We’re also talking with the Author’s Guild directly.

But in response to the legal opinions we’ve heard, in Year 3 we may adjust our library circulation practices to start with those books that have negligible market impact: scholarly works, out-of-print works, and books filling in the missing century from 1924-on. Luckily, those are precisely the books that libraries want to transition off-site. Legal experts concur: we can clearly digitize any in-copyright book and share it with the print disabled. But we’ll work with all library partners to modulate circulation according to risk. In all these ways, our stakeholders are helping us to recalibrate our plans, honor their values, and address the concerns of creators.

C. Scalability of the Project



Planning for Scale

10% of the world experience disabilities that impact their ability to read.¹ For the blind, less than one in ten books are now accessible.² We have sustainable technologies to solve that. *Open Libraries* will scale across many dimensions, bringing more diverse books to millions of learners, in more accessible formats, to an increasing number of nations around the world. In the US, libraries offer free information services for all, but 80% of libraries are small and rural,³ where time-constraints and geography present barriers to access. We will address that by transforming the US public library system itself. In 2013, an average of 17% of their books were digital,⁴ by 2023, we'll make 80% digital. IA will ensure the long-term preservation of four million 20th-century books, now missing from our digital shelves. And we'll increase the number of ebooks available to the print disabled by 10x.

To achieve these goals, we must increase our technological capacity to scan books at scale while dramatically reducing costs, and also expanding the capacity of US libraries to lend their own ebooks.

Scaling Technologies

Starting with IA's collection of 2.5 million public domain ebooks, we plan to scale to approximately 6.5 million volumes. Scanning four million new books in five years requires increasing capacity at every juncture of our workflow—from tracking physical items to improving metadata and search. Since 2015, our engineering teams have been tackling every one of these areas. In 2014, IA released its next-generation scanner, the TableTop Scribe, featuring higher quality imaging and faster processing.⁵

Cost-effectiveness will be critical. Many libraries spend more than a dollar per page to digitize their materials. At our twenty North American scanning

centers, we charge 10 cents per page. IA estimates reducing that by 66% at our new super scanning centers in Hong Kong and Shenzhen.

IA has also refined our own data storage—at a fraction of the cost of Amazon cloud services.

Expanding Diversity

The Digital Library Federation (DLF) and Digital Public Library of America's (DPLA) Curation Corps of 40-50 librarian specialists will shape targeted lists of books from traditionally underrepresented communities. On a public website, community members can vet the books we select. Working with ALA's *Our Voices* Project, we will buy everything in their pipeline from minority publishers and authors.

We plan to digitize some of the nation's finest collections of multicultural children's literature and LGBTQIA collections from the San Francisco Public Library, focusing on the experiences of people of color, the disabled, and other marginalized groups. We'll focus on books in Spanish and Indian languages to better serve the print disabled in those regions.

Activating Library Networks

Launching with early archetype innovators of diverse library types, from public to academic, we will scale up through a group of key influencers who can move peer networks forward. We will activate large-scale adoption through centralized leverage points: vendors such as OCLC supporting 16,000 libraries,⁶ state-wide consortia, and certain state librarians who oversee public library systems for entire states.

The Credibility of the Proposed Solution:

In 2011, when IA launched its digital lending library, OpenLibrary.org, we recruited 100 libraries to contribute books for scanning and lending on their behalf. All 50 State Librarians endorsed the project.¹ These early partners form the network of innovators we can scale with again.

We **built an extensive digitization supply chain** for this pilot: IA receives free books from used-booksellers and libraries. We run 20 facilities, scanning books for 1,000 contributing institutions.

Today, **IA holds 2.5+ million ebooks and executes 1.5 million annual loans**. In the last six months, **43 million people** have used our online bookreader; **319.5 million learners have downloaded ebooks**. For six years, OpenLibrary has offered temporary digital access to copyrighted works in a manner respectful of creators, without major incident. We've proved that one library can succeed, but to scale we need to replicate this model with others.

In 2016, we launched a second-stage pilot with Georgetown University Law Library, our first archetype innovator. Today, Georgetown's community has the option to check out a physical or digital copy of a growing number of its books. Over the last few years, Georgetown's Michelle Wu, has presented her model to approximately 100 libraries, encouraging them to build "collaborative digital libraries" for the entire nation. Through her journal articles² and as a first mover, Wu is one of a dozen key influencers validating this legal path forward. She's part of a group of copyright experts drafting a joint statement on digital lending, establishing a legal basis for major adoption.

Support for the Change

At the recent American Library Association (ALA) Annual Conference in Chicago, 70 members of the Consortial Ebook Interest Group met to vent their “E-Grievances.” They listed the “silo thinking between print and e-;” the urgent need to aggregate data as an industry; and that “Librarians aren’t actually engaged in ebook issues—we just accept what we have been given.” Open Libraries addresses each of these pressing problems. It empowers US librarians to shape their own digital collections.

We’re enlisting a broad cadre of early adopters of every archetype, each representing an association of peers:

- Specialty: Georgetown Law Library, Washington DC
- Independent: Society Library, New York City, NY
- Mid-size college: Northeastern University, Boston, MA
- Large University: University of Alberta, Edmonton, Canada
- Small Public: Delaware County Public Library, Ohio
- Major Urban Public: San Francisco & Los Angeles Public Libraries, California

These widely trusted champions can influence their social networks toward adoption.

We’ve established an Advisory Board of 25 global influencers in education, law, technology, accessibility, and libraries, who mobilize constituents and legitimize our solution. Open Libraries is now endorsed by the Boards of the Public Library Association, ALA and the Chief Officers of State Library Agencies (COSLA), representing 50 State Librarians.

To mitigate legal opposition, we’re following the guidance of 20 copyright experts. A working group from Harvard, Duke, NYU, and Georgetown

Universities will publish a joint statement on the legal issues involved. This common understanding will reduce risk and speed adoption by clarifying the legal framework for university and state decision makers.

Advantage of the Proposed Solution to Alternative Solutions and to the Status Quo

In *BiblioTech: Why Libraries Matter More Than Ever in the Age of Google*,¹ John Palfrey writes, “People’s information habits have undergone a sea change—a major shift toward the digital...The problem is that libraries need to provide both physical materials and spaces as well as state-of-the-art digital access.”

Libraries haven’t met this demand, stymied by digitization costs, legal risks, and missing infrastructure. A look at IA’s own ebooks and Amazon’s physical holdings reveals a missing century of books between 1923 when public domain is clear-cut, and the digital era (**See Charts**). This status quo compromises research and learning.

Google Books is the largest program to digitize millions of volumes. The resulting lawsuits sanctioned massive book digitization and access to snippets of in-copyright works. Meanwhile, as a for-profit company, Google makes no guarantees about reader privacy, preservation or long-term access.

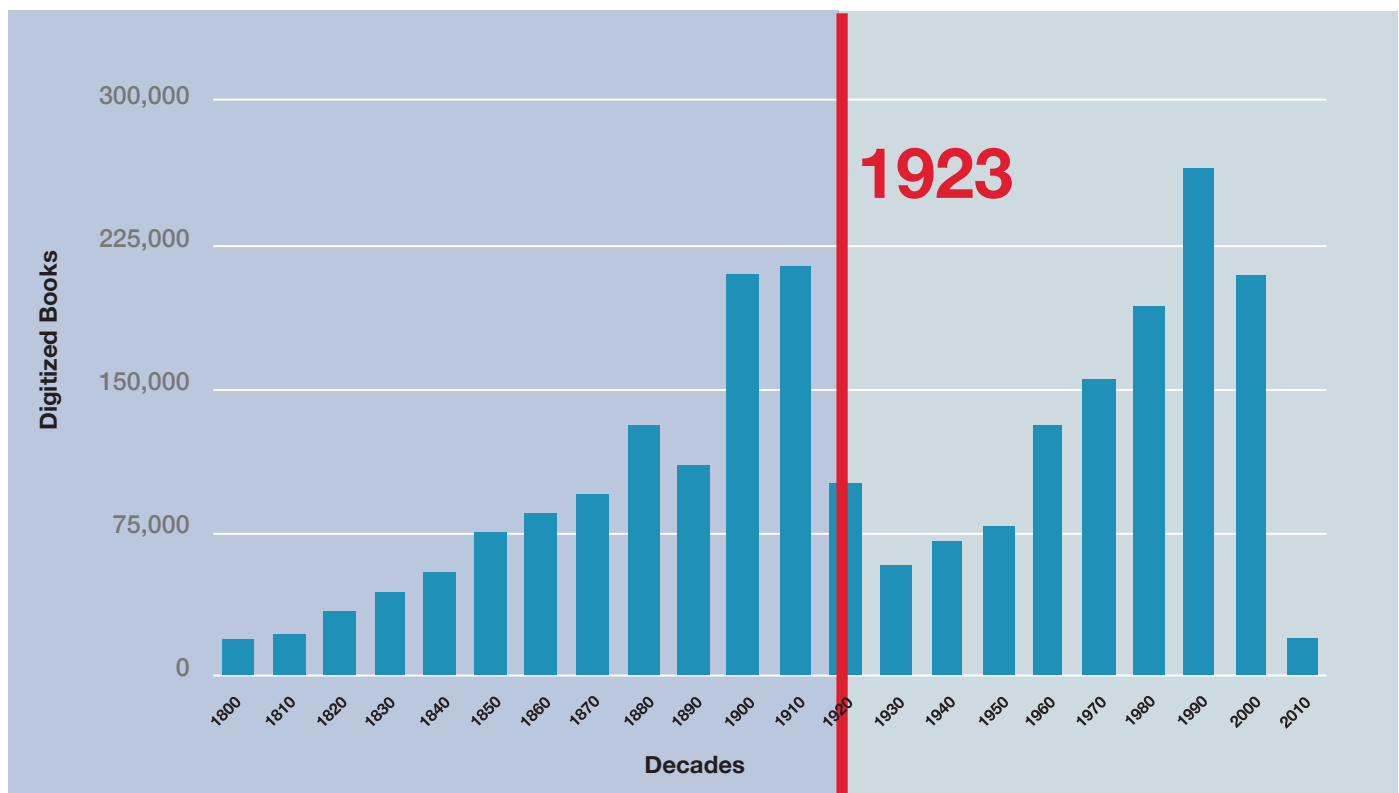
Some Google scans are preserved in an academic repository called **HathiTrust**, where university subscribers can access public domain volumes. However, in-copyright works are not accessible even to paid subscribers. Publishers now license ebooks to libraries, but only very recent and popular books, often on temporary or restrictive terms.

The growth of crowd-sourced sharing sites such as **Library Genesis** (3M



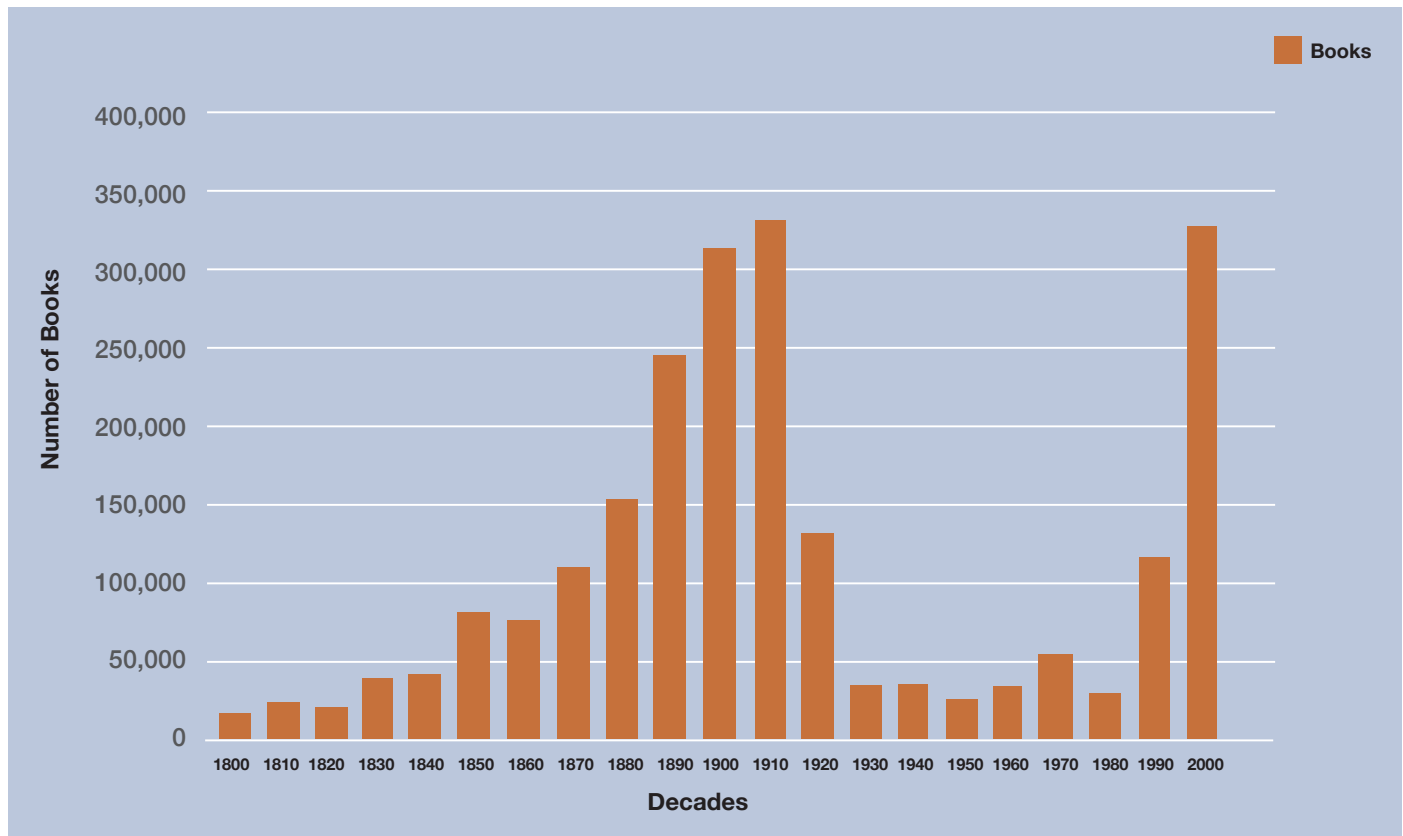
The growth of crowd-sourced sharing sites such as **Library Genesis** (3M ebooks) and **Sci-Hub** (52M articles) reflects a pent-up demand for easy, free access to books and journals. *Open Libraries* provides a legal path to some of that content. As MIT Press Director Amy Brand writes, “I see this effort as a proactive alternative to widespread circulation of unauthorized digital files.”

Internet Archive Digitized Books by Decade 1800 - 2010





Books in Amazon Warehouse by Decade 1800 - 2000



Taken from a random sample of 2500 new fiction titles available in the Amazon warehouse in 2012. Creator: Paul Heald, Professor of Law, Univ. Illinois Urbana-Champaign

Ease of Transferring and Applying the Solution at Scale

Over the past decade, IA has assembled the key elements to transition all US libraries to become digital libraries:

- Scanning capacity and a robust digitization supply chain,
- The legal foundation to support a Digitize and Lend Service (D&LS),
- Affordable, scalable technology,
- Demonstrable a model that can be replicated by other motivated institutions,
- Mobilized leaders in key constituencies to endorse the D&LS,
- A project plan to make a D&LS part of every US library's services.

The pathway to a D&LS at-scale features two work streams to broad, ubiquitous adoption. The first creates a large, compelling inventory of digital books. The second is a network of institutional advisors and service partners who will demonstrate how to launch the D&LS with minimal effort and proselytize the benefits to the community.

Why 4 million ebooks? We believe that a curated collection of 4 million titles, added to our 2.5 million public domain works, reaches an important threshold: our collection will overlap with the majority of most partners' collections, exerting the gravitational pull on later adopters to participate.

According to a 2013 survey of US public libraries, the average proportion of ebooks to physical books hovers around 17%. By analyzing data from 1200 library systems, our early results show we already hold 40% of the books in the average public library. With a more targeted inventory of 4M modern books, we can offer digital access to 80% of most library collections. These are the books that will overlap with college libraries and the millions of volumes in major public libraries.

Our greatest challenge is that libraries are heterogeneous—in type, technology, and funding-source—requiring multiple solutions. To scale, we will leverage centralized service providers and statewide networks that can activate large numbers through a centralized, single-point of contact. Perhaps our most important partner will be OCLC, the cooperative providing metadata infrastructure for the vast majority of US libraries (16,000 worldwide) and runs the cloud-based management systems for 600 academic libraries. Working with OCLC delivers two crucial capabilities—a widely available, easy-to-use matching service and the capability to surface those digital items in local catalog searches.

We're also integrating with mobile ebook platforms, including New York

Public Library's *SimplyE*, which is poised for adoption by hundreds of US libraries. *SimplyE* enables us instantly to offer highly motivated user groups with turnkey mobile access to their own ebooks.

IA has targeted the statewide consortia with the most advanced ebook strategies, including California, Connecticut, Georgia, Illinois, Minnesota and Wisconsin. At our webinar for State Librarians, the greatest interest came from rural states where library patrons travel great distances: Alaska, South Dakota, Tennessee, West Virginia and Florida.

We foresee a day when libraries everywhere will be expected to offer all their collections in digital formats. Amazon and Apple began that demand with the Kindle, iPad and iPhone, and patrons will demand it in their libraries, too. We offer the ecosystem an open infrastructure, high degrees of overlap, ease of transfer, and reduced risk.

Organizational Capacity to Implement the Solution at Scale

Since 2014, the Internet Archive has been engaged in organizational change and expansion. Our staff grew by 22% between 2014-16, adding five new directors who have the passion, expertise, and ability to sustain this project to fruition. We embrace Brewster's vision, and are capable of executing it.

Since 2014, we've been tweaking our engineering culture. It hasn't been easy—but we've evolved from a staff of brilliant individual contributors to one where skilled teams produce the most impact. During this project, we'll grow the number and size of teams along a path we've been forging for three years.

We're partnering with industry leaders, including OCLC and Benetech, that bring in-depth experience in their specialties. Benetech is the global leader in accessible digital content for people with disabilities. OCLC offers the

business and marketing teams that IA lacks.

Meanwhile, our evaluation partner, NewKnowledge, will be on hand to assist us in identifying roadblocks and adapting to new problems as they arise. We've intentionally structured the evaluation funds to be flexible and directed to outside experts in areas that may evolve.

There's something about the very DNA of IA's organizational culture that promotes scaling: we share deeply-held values and mission alignment; an open source ethos and a willingness to forego brand recognition as a provider of infrastructure. Librarians tend to be extremely collaborative, building upon the morals of our profession: reader privacy, commitment to sharing and open knowledge. All of these values will take us a long way toward scale.

Financial Sustainability of the Proposed Solution

MacArthur's support builds an enduring asset: a collection of 4M ebooks and the infrastructure to share them across an ecosystem.

To grow the collection, IA digitizes a steady influx of 250,000 books per year for paying partners.

To maintain the technology, we've identified three strong possibilities for sustainable income:

- One-time transfer fee for institutions that want to hold their own ebook files; this would allow them to build moneymaking services atop the collection.
- Activation fee when institutions "turn on" the ebook lending service. After early adopters turn on for free, we could charge a nominal fee for late adopters, with a sliding scale.
- Interlibrary Loan Digital Fulfillment: A 2013 survey shows public and university libraries paid between \$300-600 million to ship materials for interlibrary loans. OCLC runs an ILL matching service, executing 4.5 million ILL book requests



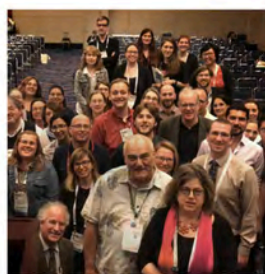
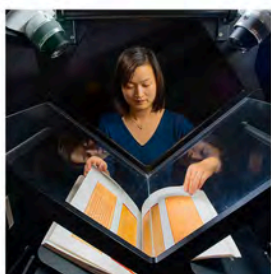
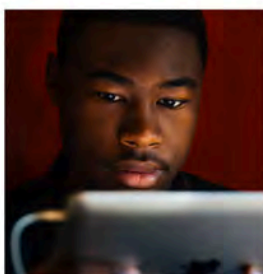
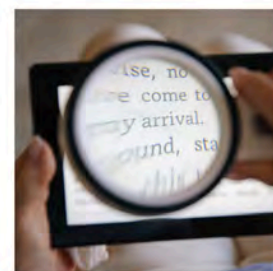
each year, averaging \$17. We can provide lower-cost ebook alternatives for ILL fulfillment. As the dominant ILL middleman, OCLC already has robust marketing, and service teams poised to expand to e-delivery.

In Year Three, IA and OCLC will conduct market research and build business plans for these three opportunities. In Year Four, we'll select the most promising and pilot them. In Year Five, we can start charging for some services.

Our plans expand the staff by 14% and reduce back to a 6% increase after Year Five. That growth seems sustainable with or without additional income.

When we are done, diverse communities will see their stories, now missing from library shelves, preserved forever.

D. Monitoring, Evaluation & Learning



MONITORING

Results

Open Libraries will transform the lives of millions of people around the globe by giving them unprecedented, free, long-term access to knowledge. This transformation will occur through one of society's most trusted institutions—the public library. Our goal is to bridge the informational divide that separates us along lines of income, geography, education, and physical ability. For many of the people who visit libraries 1.5 billion times each year,¹ the library has become their sole lifeline to trustworthy information—a place that is free of paywalls, ensures their privacy and preserves the stories that reflect their lives. Our solution combines scalable technologies developed by the Internet Archive, the information infrastructure anchored by libraries, and the membership networks of organizations with intimate knowledge of the needs of our most vulnerable populations.

Because *Open Libraries* has many facets, the monitoring and evaluation will be constructed around these key goals:

- Expanding global access to knowledge
- Increasing diversity in digital content to meet the needs of people from underserved racial, ethnic, gender and age populations, as well as those requiring special accommodations
- Expanding libraries' digital assets to maximize adoption nationwide and preserve their collections

To monitor progress in meeting these goals, we will focus on these outcomes:

- growth in digital assets made available to libraries and learners
- changes in usership patterns of digital assets compared to historical circulation
- expansion and use of assets for blind, low vision and dyslexic communities

- growth in titles and the digital content reflecting needs and interests of diverse communities
- growth in use and ebook availability to minority and underserved communities
- change in ratio of ebook vs. hard copy in library collections

The monitoring and evaluation strategy will be led by two teams with deep experience measuring change in the global library ecology. The first, **NewKnowledge Organization Ltd**, is a social science think tank that was recommended to us by the Gates Foundation's Global Libraries Program. With a decade of practice helping the Public Library Association (PLA) and the American Library Association (ALA) assess their impact, NewKnowledge is strategically placed to help align our efforts with other global library initiatives.

The second, are two research centers at the **University of Washington's (UW) Information School: the Technology and Social Change (TASCHA) group and the DataLab**, who will serve as the technical backbone of the project. TASCHA brings global experience measuring the impact of digital knowledge in the developing world; it's one of three "legacy partners" endowed with a decade of support by the Gates Foundation as Gates winds down its Global Libraries project.

Our evaluation teams will challenge our direction at key intervals, helping us to remain responsive, iterative, and true to our impact goals. Our monitoring program is designed as a transparent process tracking the "digital footprints" of our ebooks, how communities are using these materials, and their impact on the evolving ways libraries are helping communities bridge the informational divide.

Tracking

To track results, we're establishing two parallel initiatives. First, with TASCHA and DataLab, we'll create an **Impact Data Trust** to manage the quantitative measures of our project. The Trust will be a transparent, public repository for the ebook usage data that IA and others generate, held by institutions that maintain strict protocols for reader privacy and anonymity—something no for-profit analytics company guarantees. IA will preserve this data, but the UW teams will oversee its use, assisting researchers who want to query these results. By aggregating data from many sources, we hope to see the bigger picture, benefiting not only this project but the entire ecosystem. DataLab will develop the Trust's tools, protocols, and strategies to leverage these resources through its academic networks.

TASCHA and DataLab will issue data quarterly reports, using their teams to look for untold impact stories within our results. This work builds upon TASCHA's track record of investigating the impact of technologies in more than 50 countries, over a decade, including research on public libraries as venues for access to information.

The **Impact Data Trust** will capture the “digital footprint” of IA's growing ebook collection as it travels through libraries, Bookshare, and organizations for the blind to readers worldwide. Throughout the project, NewKnowledge will use an integrated set of quantitative measures and qualitative evaluation tools to provide a detailed understanding of the multiple impacts of this project for each beneficiary group.

Digital footprint data will tell us what content is being used and at what frequency. These data will point us in the direction of where to deploy targeted focus group studies. Working with Benetech and the Digital Library Federation, NewKnowledge will set up community panels to better

understand the information needs and priorities of different groups. Blind versus low-vision users, dyslexic learners, and ethnic communities all have unique ways of considering need and equity in library collections. DLF and Benetech's community feedback will complement IA's digital use metrics to tell a fuller story.

As questions arise about sub-populations arise, we'll respond to the evolving context. We've reserved 1.5% of the budget for specialized sub-contractors who will conduct surveys, focus groups, or other investigations to address new questions as they arise.

Meanwhile, NewKnowledge and TASCHA already monitor the library ecosystem, analyzing data to help increase libraries' impact at scale. We can leverage their wider work to add to our own, including resources from: the International Federation of Library Associations, the Public Library Association, Benetech, the Digital Library Federation, the Gates Foundation-supported *Libraries Transforming Communities* and the *National Impact of Library Public Programs Assessment*. The Internet Archive's data scientist, Vinay Goel, has already found insights by crossing the collections of 1200 library systems with our own book collections. We can only imagine what he will find once we establish the Impact Data Trust.

It's exciting to imagine IA engineers, librarians, social scientists, data scientists and community panelists working together to analyze what it means for people when they have free and unfettered access to more and better information.

Milestones:

Year 1: Building Infrastructure: Influencers, Validators, and Innovation Partners

Year One rolls out in three phases: A) building the human and technical infrastructure; B) securing outside validation; and C) engaging the first wave of partners for testing & community feedback loops.

- Core Staff hired, including Key Books Leaders
- Advisory Board meets in 7 Working Groups
- Legal scholars build consensus around fair use arguments
- Create College Core/Public Library Core Book Lists
- Purchase ebooks (from publishers, authors)
- Scanning Center capacity—174,000 books
- Engage Archetype Innovators in first-wave testing
- Establish the Promise: Media Campaign “Everyone Deserves to Learn”
- Secure key endorsements
- DLF launches Inclusive Curation Project & dashboard for public feedback
- M&E: assumption testing, goal setting, forming sampling frames, and feedback panels
- TASCHA establishes Impact Data Trust

Year 2: Refining Technologies & Setting Priorities

In 2019, we focus on A) refining our technologies; B) building a compelling collection of books; and C) expanding through established library networks.

- DPLA Curation Corps select books for diversity and education
- Establish “Most Widely Held” and “People with Disabilities” lists

- IA improves accessibility of site & books
- Scanning Center capacity—198,000 books
- Books flowing in from many sources (booksellers, paying partners, libraries)
- Scaling through statewide library networks and service partners
- Raising Awareness: Media Campaign “Inspired to Lead”
- M&E: diversity feedback and priority setting among collaborators
- TASCHA: first data subcontracts issued for outside learning
- Financial modelling: Three Business Options with OCLC

Year 3: Expanding Reach, Reassessing Impact, & Gap Analysis

In 2020, IA builds a compelling collection & circulation system. We expect to see network effects in both reach and impact.

- Large user groups engaged: Wikipedians, OER Educators
- Certified People with Disabilities now authorized for ebook delivery
- Global expansion towards Marrakesh Treaty nations; Benetech launches Spanish Portal
- Scanning Center capacity—723,000 books
- Circulation & Integration systems built
- IA Partner Support Teams conduct training, onboarding
- Media Campaign to engage public participation
- M&E: reassess impact, recalibrate priorities, gap analysis
- TASCHA: administering Impact Data Trust research for data-driven insights
- Business model trial

Year 4: Recalibrating for the Final Sprint

In 2021 our focus shifts to A) content discovery and B) understanding impact. We have a final chance to recalibrate and fill gaps.

- Discovery through Wikipedia citations & direct links
- Close to turning 80% of the average public library collection digital
- Global expansion towards Marrakesh Treaty nations
- Scanning Center(s) capacity: 742,500 books
- Overlap with majority of major public libraries' collections
- Partner Support team builds self-guided tutorials
- M&E Team: final priority setting and recalibration
- Business Model validation—service ramp up

Year 5: Legacy Planning for Infrastructure & Support

In 2022, we focus on building the legacy infrastructure and institutional support to sustain and grow Open Libraries' assets.

- Staff ramp down as key infrastructure is built and stable
- Scanning Center(s) capacity: 742,000 books
- Ramp up: paying scanning partners in super centers
- Major overlap with mid-size college collections & books cited in Wikipedia
- Late adopters join
- M&E: retrospective impact analysis
- TASCHA: support planning for Impact Data Trust
- Decisions re: business for legacy support

EVALUATIONS

Changes for Beneficiaries:

For the purposes of evaluation, we divide beneficiaries into five categories:

- **Learners who both seek and need greater access** to books in digital format, including people living far from a library, housebound, elderly, or those physically unable to get to a library to borrow physical materials. They may also be people who increasingly rely on and use digital materials in their daily lives.
- **Individuals who require physical accommodations** to benefit from print resources, including blind, low vision, mobility-restricted, and dyslexic learners, and others who require digital tools to access learning content.
- **Groups excluded by the informational divide**, including minority communities and lower-income Americans, many of whom rely on library services to fulfill their information-driven needs.
- **Diverse communities** whose cultures are underrepresented in library collections.
- **Library professionals** in the midst of a significant transformation of services they provide.

One of the reasons we chose NewKnowledge is their impressive track record designing evaluation programs that recognize the need to work directly with those most at-risk. They recognize that data representing majority audiences can conceal the needs of minority groups. Thus, NewKnowledge's strategy is built upon qualitative feedback from a network of community-based panels. Throughout the monitoring process, NewKnowledge will measure not only how many titles we've added or what kind of content we've made available, but they'll work with all of these communities, ensuring each addition reflects their needs. They will report to us each quarter, informing us if the data is representative of the lived experience of library patrons. These evaluation strategies bring new communities into the planning process over our five-year project.

NewKnowledge will recruit representatives from each beneficiary group in waves over the five years for qualitative research. This includes community panels of users from partner libraries—coordinated by leaders from the Digital Library Federation. Working with their cultural assessment model and expert knowledge of each cultural group’s needs, DLF works to develop a community voice that helps set priorities for book selection and independent cultural review of how needs are being met. TASCHA will issue quarterly benchmark updates to support review and priority-setting for the work’s next phase.

As part of a consolidated needs report, NewKnowledge will undertake regular community-wide surveys, benchmark reviews from across the library field, including both early adopter sites and user interviews. They will work with Benetech to evaluate how their 486,000 members are using and benefitting from access to 10x the books they had before. Perhaps more importantly, they will gather data from libraries who have not adopted the Digitize and Lend Service (D&LS) and people with print disabilities who are not downloading a broader range of books, to learn why some of these areas have stalled. These reports will highlight how *Open Libraries* is removing barriers to knowledge, which books have multiplier value across sub-groups, opportunities for expansion, and the status of persistent barriers to adoption. If we aren’t hitting scale or reaching people, NewKnowledge will work with us to discover why.

Data Sources

The Internet Archive sits at the nexus of three data-driven professions: technology organizations with our ability to gather data dynamically at scale; libraries, creators of the union catalog of books featuring the best structured metadata of any profession; and the Open Knowledge world of Wikimedia Foundation, dedicated to posting all its data in an open, transparent fashion. We will be able to gather data from all these sources—most likely lots of data. But there's a difference between gathering data and making sense of it.

That's why our strategy includes the data scholars at University of Washington's DataLab. UW is renowned for its cross-disciplinary research, pairing social scientists like TASCHA's Chris Coward with data scientists like Dr. Carole Palmer. It will take the stellar reputation of the UW Information School to convince libraries to entrust their readers' data to an outside institution. But once convinced, we have the opportunity to gather data from the hundreds of libraries using NYPL's mobile e-reader *SimplyE*, data about the 9 million interlibrary loan exchanges brokered each year by OCLC, not to mention the circulation data of thousands of partner libraries. These data will tell us which library's patrons are borrowing the books and other key use data. Using sampling metrics, NewKnowledge will be able to extrapolate understanding about who is reading. But understanding why these results are important will take a mix of quantitative and qualitative methods.

Mixed-method evaluation relies on the careful arrangement of quantitative data and parallel qualitative data that can explain potential variations in results. Surveys, interviews, and large scale user and non-user data will inform this project. For *Open Libraries*, these data will come from an array of sources, including IA digital activity, data aggregated by project partners, circulation data about physical books from a stratified targeted sample of

partners, and formative evaluation studies of users vs. non-users.

Big data alone does not always tell an accurate story of impact. Given our wide array of beneficiaries, our methods require validation of any quantitative data for its truthfulness to each community. To assure validity, we'll use benchmarking templates for each service community. DLF will help us convene community panels, issue surveys of their working groups, and gather public feedback via their dashboard. NewKnowledge will conduct case study interviews exploring how the service is evolving, with everyone from Chief Technology Officers to end users.

Our plans call for TASCHA to lead a yearly "Data Mobilization Discussion" to review the data, consolidate feedback, and conduct case study interviews with our peers about how the practice is evolving. We will award small sub-contracting grants to specialists who want to dig deeper into these troves of data.

Methodology

Our evaluation team is committed to "**Mixed Methods**" evaluation, a strategy that recognizes the importance of collecting both quantitative and qualitative measures to gain a full picture of impact. This approach will assess the impacts of the project for each group of beneficiaries listed earlier in this document.

Evaluation studies will collect data from each beneficiary community over the life of the project, studying patterns and needs as they emerge. Working with each partner, the evaluation team will monitor how new titles are selected and how they represent the voice of the communities they serve. It will track adoption rates among libraries and identify challenges as well as successes as the process continues. It will validate the growth in digital collections and

document their usage. It will further look at the effectiveness and learnings among the many project partners.

We will draw data samples about usage and collection growth from a wide range of public, academic, and specialist libraries, urban and large libraries, rural or small libraries, stand-alone destination libraries, early adopters and those who remain resistant or minimally involved. To assure the growth of materials reflects the needs and interests of diverse communities, we anticipate using public forums, open discussion groups, spot surveys and open response tools to gather feedback throughout the project. New data will be benchmarked against other information residing in the DataLab, the research group residing at the UW Information School. Methodologies also include the organization of annual “Data Mobilization” summits, bringing together partners to review activities and findings, as well as publications to share with all partners.

All data will become part of the **Impact Data Trust**, developed and managed by TASCHA. This information will not only be useful to help us develop the best line of inquiry and data gathering as we move forward, it will also serve the larger needs of the field. We anticipate new avenues of inquiry to arise throughout this project. We will therefore support sub-contractors with an interest in pursuing relevant questions, designed to add continually to the understanding necessary for the overall project to be effective.

The expertise of NewKnowledge, TASCHA, and DataLab will continually inform the evaluation process, determining the range and type of relevant methodologies, recognizing new opportunities for pertinent data collection and research, and being fully responsive should a change in direction be warranted.



Our measurement and evaluation strategy—focusing on regular updates, rapid feedback reports, and teams that collaborate closely on data implications—outlines an approach that will allow us to make continual course corrections to ensure our work is equitably serving those most in need, identify paths to broaden or deepen our impact as the program evolves, and ensure we are able to leverage resources as ebooks shift the access landscape.

Gender Analysis

Open Libraries seeks to provide a more equitable distribution of assets to all members of society. For girls with disabilities, the divide is even wider; fewer attend school than boys, exacerbated by a lack of accessible books. *Open Libraries* addresses this issue, particularly in India, where we'll partner with Centre for Internet and Society to address girls' education needs. In June, the Digital Library of India contributed 463,000 Indian ebooks to IA (50 languages). By analyzing this collection with a gender frame, we'll prioritize improving the quality of certain ebooks to achieve the greatest impact for girls.

We'll also focus on balancing representation of women in digital collections. As Advisor, Anasuya Sengupta, writes:²

When a young Dalit woman from Daulatabad with no easy access to libraries cannot read her own community's scholarship, she cannot fight back the oppression of centuries of being considered "untouchable," and having her history and knowledge denied...The reality is that if you're not online, you're not in Wikipedia, you don't exist.



Today, there are few histories written by or about women and even fewer online. To redress this, our evaluation prioritizes equity as a measure of collections development, to find female authors from the early 20th century and those representing the history of non-binary gender representation. In his paper *M or F*, our evaluator John Fraser explored fallacies that accrue from using binary data analysis to report on gender impacts. These critical questions are where our qualitative evaluation will ensure IA's approach is inclusive and accurate.

LEARNING

Findings

To quote Chicago Public Library's Commissioner, Brian Bannon, "Libraries always have been, and continue to be, in the knowledge business, not "static or unchanging institutions. Instead, libraries have evolved to support knowledge creation and dissemination in ways that are relevant to our communities' changing needs." One focus of our work, then, is to accelerate this evolution.

Open Libraries is, by nature, a learning endeavor, working iteratively with the library community to shape greater understanding of how digital access can liberate all learners.

Our learning outcomes include:

- Digital Infrastructure innovation, an enduring public legacy of this investment.
- Process innovation that moves libraries' decision-making about collections from behind-the-scenes to a national dialogue on the needs of the underserved.
- Collection Development innovation based on analysis of aggregated data

about circulation.

- Inclusive Curation Innovation from the community panels and working groups at DLF.
- Data-Driven research from TASCHA that can guide strategic library growth.
- Learning about the aspirations of print disabled communities who have traditionally been offered a minimum of services rather than the full range of opportunities.
- Shifting perceptions of value encouraging long-term preservation of collections for future generations.
- Understanding changing space allocations that may expand opportunities for new library learning programs.
- Expanded legal understanding of the necessary strategies for public institutions to serve their online, networked communities.
- Identifying how readily available, trustworthy information can combat the trend toward “alternative facts” that undermines democratic reasoning and decision-making.

These learnings will impact how we set our priorities, allocate our budgets, and rebalance resources to address problems or accelerate successes. We’ll monitor different signals with our legal advisors to adjust our plans according to perceived risks. In India, we’ll have on-the-ground advisors to monitor how 6.5M books are reaching people with print disabilities and sub-contractors to investigate any “last-mile” issues.

But data, impact reports, colloquia—these only go so far in understanding a dynamic system. So we’ll go out in the field, hang out in youth medialabs, and talk to librarians and leaders to get a holistic picture of the systems we’re helping to change.

Two years ago, we led a summer reading program for children of Internet Archive staff. Each week we’d digitize an award-winning book and come together to discuss it. A few children came and went, but the program was really set up for Eileen Alfaro, a bright 4th-grader whose mother Roxana works with us. It became apparent from our conversations though, that

Eileen wasn't finishing the reading. She had a computer, we digitized the books—*was this straight-A student slacking off?* We came to understand the problem was the poor Wi-Fi in Eileen's apartment that made it almost impossible for her to flip the pages in our browser-based bookreader. Eileen needed to *borrow* the book, to download it for a 2-week span, in order to read successfully.

As we're building this global service, we remember Eileen. We'll take the time to meet others like her, to make sure all the signals line up with the lived experiences of those we serve.

Dissemination

As outlined in the Project Plan, *Open Libraries* is an open, transparent, community-responsive project that has scheduled milestones and staff dedicated to sharing our findings.

Strategies include

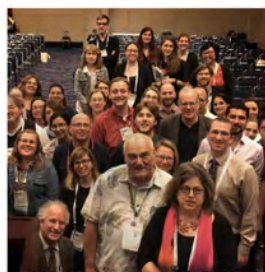
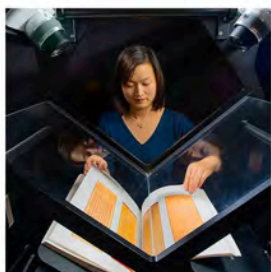
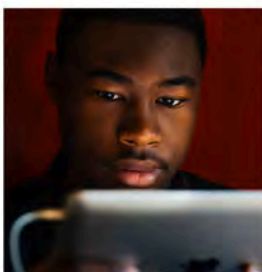
- Annual Data Mobilization Workshop (UW Information School)
- Annual Library Leaders Forum
- Annual IA Celebration with 700 supporters
- Two-way communication through DLF's Dashboard
- Public dissemination through IA's blog, Facebook page (118,000 followers), newsletter (circulation: 750,000), OpenLibraries.online website
- Legal presentations at Fair Use Week events
- Wikimedia's public documentation and engagement at Wikimania, Wikicite

Our **M&E Teams and advisors**—who include nationally recognized experts in law, education, technology and library sciences—will disseminate findings



through academic articles and professional circles. **Brewster Kahle** is a frequent keynote speaker. *Open Libraries* Team members will present our findings at dozens of conferences and fora. Through all these channels we will share our lessons with decision makers in law, education, local government, libraries and philanthropy to amplify impact.

E. Additional Information



Detailed Budget Narrative

This five-year budget reflects **expenses totaling \$101,142,290**, offset by **\$1,143,096 in project income, including an \$1 million Arcadia grant** to digitize publisher's backlists in 2018-2019.

Largest budget categories: acquisition/shipping of physical and digital books (13% of budget); scanning and storing those books (46%); and staff and fringe (23%). These figures assume:

- Since 2006, IA has scanned approximately 2.5 million public domain books and 540,000 modern works.
- In our 4M book lending collection, we assume 825,000 books (20%) of our curated list will come from our existing collections or those uploaded by others. For instance, the Digital Library of India recently contributed 465,000 books in 50 languages.
- 585,000 books will be added by libraries that pay IA to scan their books. (Since 2004, IA has digitized approximately 250,000+ books per year for paying partners.)
- 10,000 ebooks will be purchased directly from publishers/authors. This is a modest figure, since there is no current pathway for libraries to purchase ebooks rather than license them.
- 2,580,000 books will be purchased or donated to IA, scanned, and physically archived in our repository.

Our **long-term storage rate** of \$5/book reflects the cost to store a physical book in our existing repositories. These warehouses are owned by a separate non-profit entity, The Open Library of Richmond, which charges IA below market rates.

Digital storage and serving cost is \$2.00 per book, representing an average 1.5 gigabytes for a typical high resolution set of files. We base this on **Stanford researcher, David Rosenthal's** study of our long-term data center costs. This is significantly lower than commercial cloud storage rates.

Approximately 4% goes to **Benetech**, to help us increase the accessibility

of our texts and provide authorization for its 475,000 members to download any book on archive.org. Benetech will also develop a new platform serving people with print disabilities in the 12 Spanish-speaking Marrakesh Treaty signatories, 10 of which do not have any national ebook platform for people with disabilities.

We devote 4% to measurement and evaluation activities with outside teams, **NewKnowledge Organization, and University of Washington's Technology and Social Change (TASCHA) Research Center**, which will oversee an "Impact Data Trust" for libraries, an open repository for user data from IA and others. We allocate flexible funds for expert consultants to use this data to analyze our impacts and system-wide effects.

In Year 3, we'll research three possible lines of business, construct business plans for the most promising and establish a pilot by Year 4. For instance, OCLC will research the potential for integrating IA's electronic lending library with OCLC's Inter-library Loan (ILL) system. In 2013, libraries spent approximately \$300M for ILL fulfillment, so we see tremendous market potential to provide e-delivery of those same books. However, this 5-year plan is not dependent upon earned income.

IA reserves 6.8% of the budget for indirect expenses supporting this work.

Your support creates an enduring information asset and the financially sustainable infrastructure to access it globally.

Project Risk Management

Our greatest risk lies in working with in-copyright books. Over the last decade, there have been two major copyright lawsuits¹ against libraries. In both cases, libraries have prevailed, greatly expanding what they can do with in-copyright materials under fair use.

This project expands ebook access in five ways:

- 1) **To the certified print disabled**—defined as the visually impaired, people with perceptual disabilities such as dyslexia, and those with physical disabilities unable to manipulate books. Explicitly permitted by statute.²
- 2) **To researchers**—for “non-consumptive” data analysis.³ Upheld by US court.⁴
- 3) **To journalists & Wikipedia editors**—for “snippets” when citing books for footnotes or fact checking. Upheld by US court.⁵
- 4) **To libraries for distributed preservation**—digitize a book once and make it available to libraries owning the physical book. Upheld by US court.⁶
- 5) **To authorized U.S. library patrons**—by providing controlled digital lending (CDL) of library materials. IA has operated OpenLibrary.org with CDL for 6 years, without contest.

In May 2017, copyright scholar, Pam Samuelson, convened a workshop of twenty fair use experts to consider each of the cases above. They agreed that #1-4 are clearly supported by the Chafee Amendment,⁷ the Marrakesh Treaty, and recent court decisions. Therefore, we believe there’s minimal risk in executing large-scale book digitization for the print disabled in 29 countries and transformative uses for journalists and educators. Distributing

copies to libraries is also sanctioned.

The risk, if any, lies in providing temporary digital access to a library's physical books (#5). Following Samuelson's meeting, copyright experts began crafting a joint "Statement on Controlled Digital Lending of Physical Library Collections," (see Technical Review) to build widespread understanding of this legal framework.

However, neither IA nor its library partners is interested in lawsuits. For 20 years we have worked successfully with legal advisors and publishers to help avoid them. One reason we maintain good relations is that we avoid creating negative market effects by purchasing publisher's products when available.

We follow a "bend not break" approach to takedown requests: by engaging with rights holders, explaining our nonprofit mission, and when necessary, removing an item from our site. Since IA's lending library launched in 2011, approximately 116 rights holders inquired about takedown; 64% chose to leave their books on archive.org once they understood we make no money from their content. By showing authors respect, we have made 540,000 modern works from 100 libraries available since 2011 via OpenLibrary.org, all without incident.

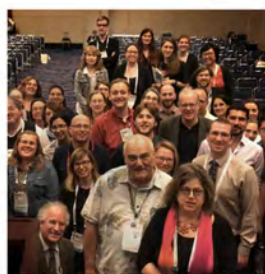
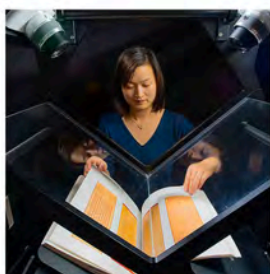
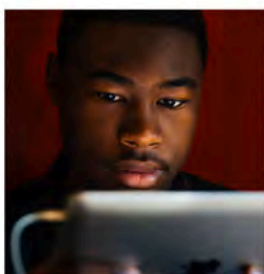
We're also actively working with authors and publishers whose goal is to expand readership. Houghton-Mifflin-Harcourt and MIT Press have signed MOUs allowing us to scan their backlists and lend them via OpenLibrary.org. We're partnering with the Author's Alliance, supporting writers who own digital rights to their books. We've engaged in conversation with Authors Guild Executive Director, Mary Rasenberger.



To further reduce risk, we can control which ebooks we lend; we will start by avoiding textbooks and newer titles publishers may already license to libraries.

We monitor our files for cyber threats and maintain multiple copies in different locations.

F. Financial Strength and Stability



With IA's core services stable, in 2014 our founder, Brewster Kahle, decided to make a strategic shift. IA would focus on making its 30 petabytes of cultural heritage materials have greater impact for our 1+M daily patrons. Kahle also wanted to add resiliency to our finances and staffing. From 2014-2016, we added 5 new directors and 21 staff **(22% increase)**, including key second-in-command positions. **IA's total budget increased 21%.** (See 2014-2016 financials.)

Since 2006, IA has run **two successful fee-based technology services** that allow us to grow our collections, while financing the teams that maintain them: **Web Archiving [\$3.7M]** and **Book Scanning [\$5.4M]**. Earned income in 2016 was **\$9.4 million (55% of our total annual budget)**. Over the last five years, earned income has comprised a healthy 54-62% of our total expenses **(Exhibit A)**. Between 2014-16, our Web Archiving service continued to grow at a rate of 55%.

Earned + Contributed Income vs Expenses 2012 - 2016

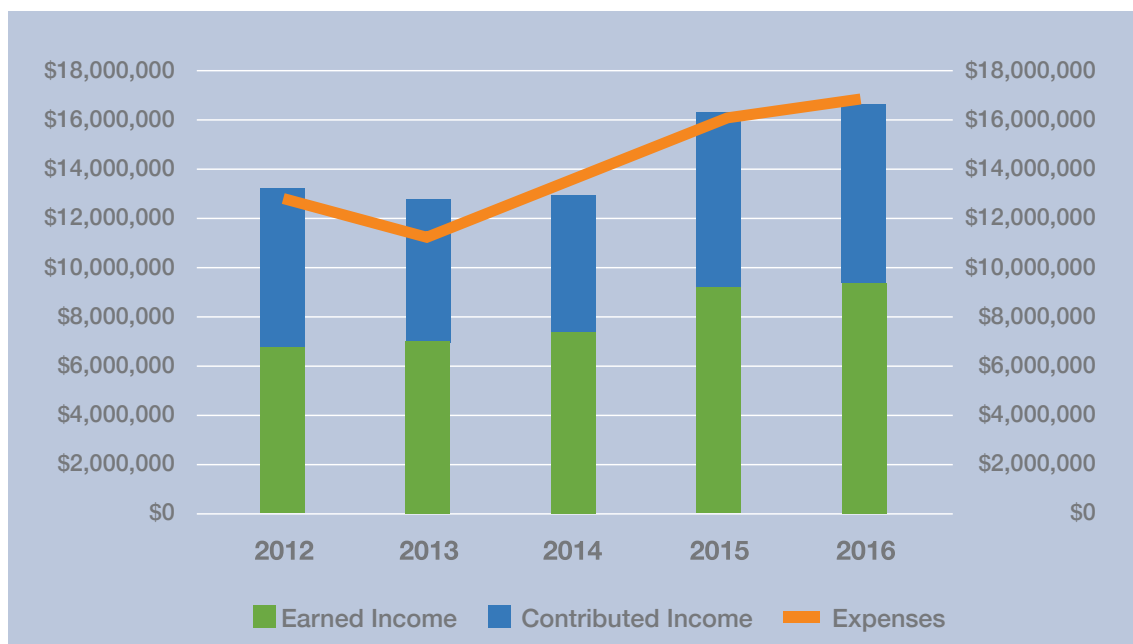


Exhibit A



This self-sustaining business model allows us to make 3 million books and 300 billion web pages accessible to all, for free.

The rest of IA's income comes from three sources: **foundation grants**, **small individual donors**, and **one major donor**. In 2014, IA added a Director of Partnerships who oversees institutional and individual giving, increasing foundation support by almost **\$3 million** in 2015. (Our periodic negative net income reflects grants reported on an accrual basis.) Foundations have contributed in excess of **\$17,745,000** over our 20-year history (**Exhibit B**). By design, IA does not depend on foundation funding for core services, only for one-time innovations or scaling. This ensures stability as grants fluctuate.

Foundation Funding 1996 - 2017

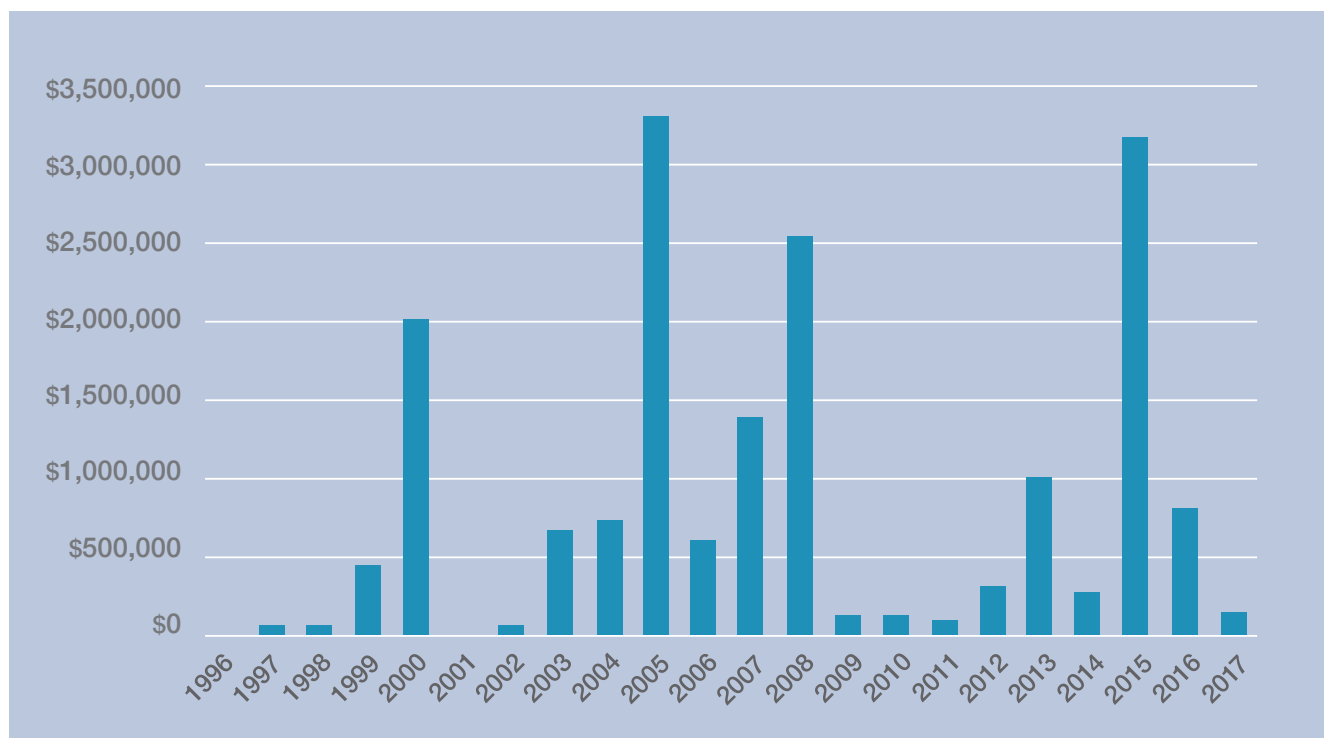


Exhibit B



Individual Small Donors by Year 2012 - 2016

YEAR	TOTAL DONATIONS	# DONORS	AVERAGE DONATION
2012	\$251,267*	1918	\$131.00
2013	\$461,988*	5314	\$86.94
2014	\$580,759*	14,071	\$41.27
2015	\$1,008,438	24,377	\$41.37
2016	\$1,471,000	38,054	\$38.66

* = Does not include Bitcoin

Exhibit C

To add another stable funding source, IA launched its **first fundraising campaign in 2013**. By posting fundraising banners only at year's end, we've seen the number of **small donors grow 65%**, and **donations increase 46% annually** since 2014 (**Exhibit C**). In 2017, we expect our patrons will contribute \$2.1 million to sustain the services they've come to rely upon.

Meanwhile, a **single major donor, Brewster Kahle**, contributes the balance IA needs each year. Over the last five years, this amount ranged between **\$2.3 million to \$5.2 million (Exhibit D)**. As a strategy to mitigate risk, IA has never established an endowment; however it has a guaranteed source of philanthropic support to sustain its basic services in perpetuity. For similar reasons, the capital assets that the Internet Archive draws upon—its headquarters, warehouses, and some distributed data centers— are owned by other philanthropic entities whose missions are closely aligned with IA's.

The goal of our financial structure is to ensure the continued basic operation of the Internet Archive in perpetuity, with access to necessary storage at affordable rates, while minimizing the risk of exposure that a large endowment creates. We believe our business model will support continued growth through a sustainable flow of earned income. IA also has the potential to build new services on top of a digitize-and-lend operation for libraries. We are planning for the day when Kahle's financial contribution will be unnecessary.

Individual Donations 2012 - 2016

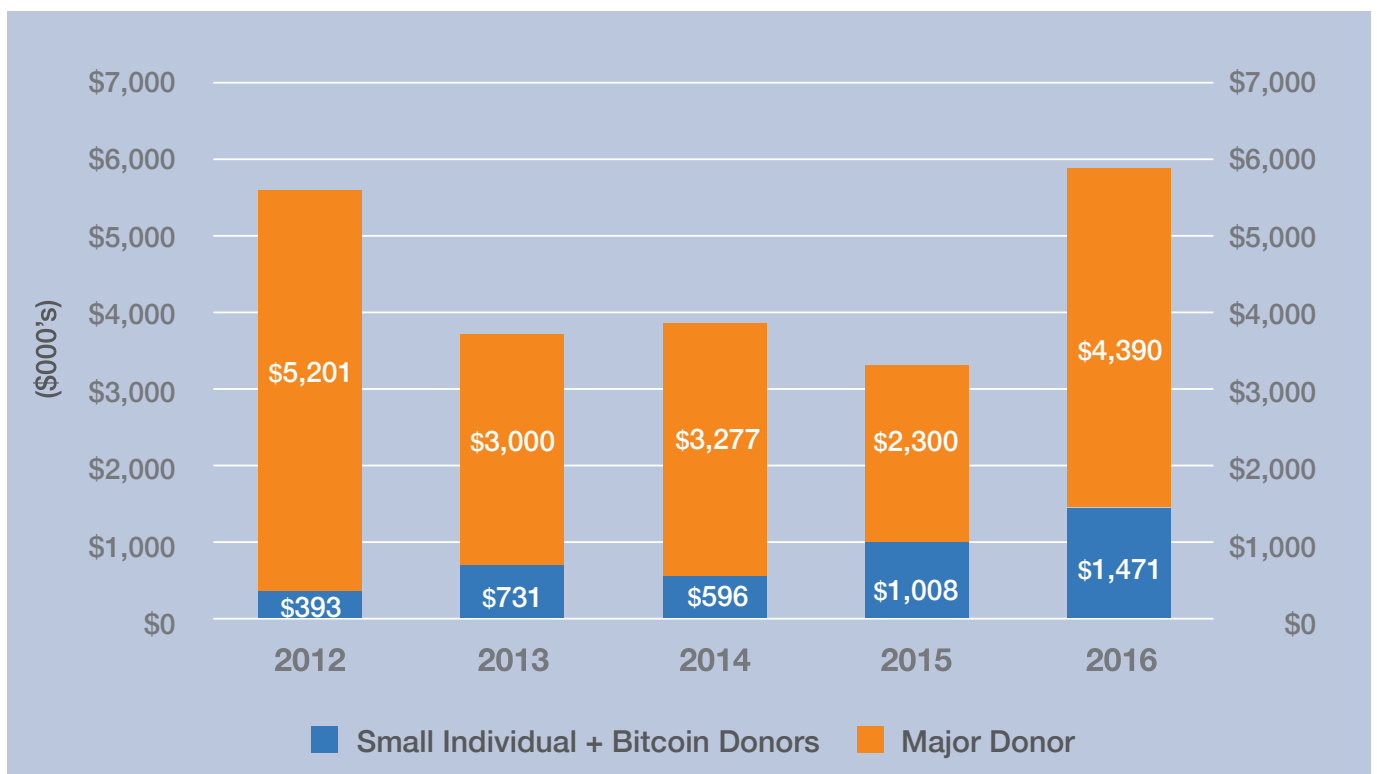
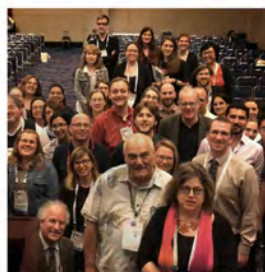
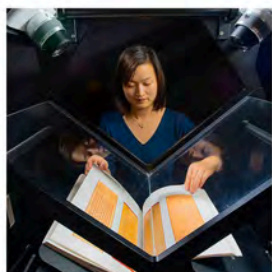
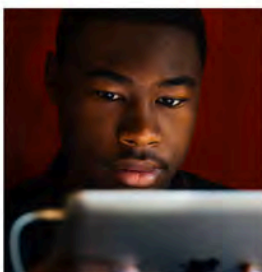


Exhibit D

G. Technical



Technical Explanation

(This section focuses on technical legal questions—rather than technology.)

Open Libraries will provide marginalized populations with access to millions of digitized books that they cannot access otherwise. We will do so by making public domain works available to all users without restriction (in contrast to Google, which places certain restrictions on its public domain scans) and in-copyright works available in a limited manner consistent with copyright law.

Providing digitized copies of works to certain populations, such as those with visual impairments, has already been codified,¹ so this response will focus only on the issue that has not been tested by courts: Controlled Digital Lending (CDL) which provides temporary digital access to a library book for a two-week period, one reader at a time. IA has employed CDL since 2011 via OpenLibrary.org without incident. OpenLibrary.org lending mirrors traditional library practices permitted by copyright law, and our project would enable other libraries to do the same: to lend only as many copies as they lawfully own and each copy only to a single user at a time, for a limited time.

We have structured our project to expand access to a “missing century of books” from 1924-on, while remaining respectful of copyright owner interests. We believe that CDL is fair use—a central tenet in United States copyright law, allowing for socially beneficial uses of a work without permission from the copyright owner in limited instances. Fair use serves the ultimate goal of copyright: to expand public knowledge and understanding. The Copyright Act provides four nonexclusive factors for courts to consider in determining whether a particular use is fair, discussed below.² When read together with the first sale right, which limits the rights of a copyright holder to control the further sale, donation, or lending of lawful copies of her work

once they have been distributed, fair use supports CDL for titles libraries already own in physical form.

Below we offer a more detailed understanding of how fair use and first sale work together to effectuate CDL practices:

Factor One: The Purpose and Character of the Use

IA lends books “for nonprofit educational purposes.” These include providing access to information in order to encourage literacy, education, criticism, comment, news reporting, teaching, scholarship, and research, creating the informed citizenry essential to a functioning democracy. Both physical lending and CDL can facilitate these purposes, but CDL substantially enhances them by providing non-discriminatory access and informational self-sufficiency to people who live in rural communities, the elderly or physically disabled, and others for whom a trip to their local library is a barrier to access. These noncommercial and socially beneficial purposes strongly favor fair use,³ especially given that the CDL one-to-one model effectuates the first sale right, which has been part of Anglo-American law for centuries and consistently codified in U.S. law by Congress.⁴

Factor Two: The Nature of the Copyrighted Work

The published works lent may range from the highly factual to the highly creative, which could weigh for or against fair use in any given instance. Courts have generally recognized that this factor is rarely dispositive and must be considered in light of the other factors.⁵

Factor Three: The Amount and Substantiality of the Portion Used

The amount used must be reasonable in light of the purpose of the use⁶ and courts have found use of entire works fair for many purposes.⁷ With CDL,

a user is granted temporary access to the entire work. After the two-week lending period, the user may no longer access the book, unless she checks it out again. If the library only owns one physical copy of the work, then additional users must join a waitlist. Just as it's reasonable and customary for brick-and-mortar libraries to lend out entire physical copies of books for a short period, providing temporary access to an entire digital work is reasonable for the purpose of short-term, controlled lending in response to a user's request for, and expectation of, access to the entire work.

Factor Four: The Market Effect

Fair use jurisprudence recognizes a long-established principle that not all market harms are cognizable copyright injuries.⁸ The classic example is the market harm from a negative book review—although sales may be lost, this does not “count” as harm under the fourth factor. Library lending is another such example, as it is based on the first sale right permitting certain harms to the original market of a work.⁹ Indeed, the Supreme Court recently reaffirmed the principle that a copyright owner is not—and never has been—entitled to maximize every available profit.¹⁰ While all library loans have the potential to substitute for users purchasing new copies of titles, any alleged market harm from such functions is accommodated by copyright law.¹¹ Given that CDL maintains the same number of circulating copies as physical loan systems and does not generate any profits for libraries, there is no evidence that CDL will create any greater market harm than the lending of physical books. Moreover, because CDL depends on all copies having been legitimately acquired, the rights holder will have been compensated for all CDL copies at the time of first acquisition. Maintaining the same “owned to loaned” ratio of library books in circulation, regardless of format, mitigates undue market harm. This factor strongly favors fair use.



Copyright law, court decisions, and scholarly works show it is likely that CDL is a winning fair use argument.¹² Further, libraries engaging in CDL need not digitize their own books in order to participate in CDL. Courts have recognized that libraries may contract with third parties to digitize books for the library's benefit when this is done for fair use purposes.¹³ Accordingly, the provision of digitized versions of books libraries already own in order to engage in CDL is also legally permissible.

IA is no stranger to bringing massive collections of materials, from web pages and software to TV news and music, online. Our legal framework allows *Open Libraries* to do the same for books without breaking copyright rules.

Conclusion

How do we know we'll succeed?

Because we've done it before.

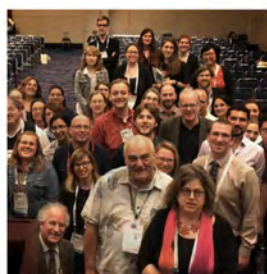
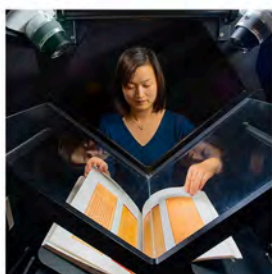
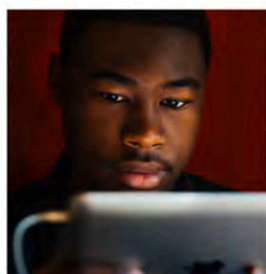
20 years ago, the Internet Archive invented some of the first crawlers capturing the web. We scaled that technology into a global service—the world's only free, public, long-term web archive, the “Wayback Machine.” Since then we've archived 298 billion web pages; by the time you read this, it'll be 300 billion. As Jill Lepore writes in the New Yorker, “If it's not in the Wayback Machine it doesn't exist.”¹

Here's the thing to remember: when we launched in 2001, legal advisors told us we'd certainly be sued. After all, these billions of web pages are in-copyright. But here we are sixteen years later, without major incident, providing an indispensable social good.

Meanwhile, storing it all became expensive, so in 2006, we launched a web archiving service for paying customers. At one time, we crawled most of the world's domains for them, but a world with only one archive is a bad idea—so we gave the technology away. Today, most of the world uses our open source Wayback code. We helped establish a multi-stakeholder governing body to set standards for this new global ecosystem.

Who within 100 miles of Silicon Valley would build a tech monopoly, only to give it away? A social entrepreneur, a digital utopian, dedicated to launching an entire global field because it seemed no one else would. Where is the internet's memory? It's in our digital library. Together we can preserve all the books now, too.

H. Ancillary Materials



Evidence of Engagement

Building the *Open Libraries* Community



By 2020, we can spark a new ‘Carnegie Moment’ in which thousands of libraries unlock their analog collections for a new generation of learners, enabling free, long-term, public access to knowledge.

-Brewster Kahle

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Evidence of Engagement

Highlights from the Letters of Support



Open Libraries Highlights from Supporters

A project such as now envisioned by IA's *Open Libraries*, with its aim to enable free public access to millions of digital books that would serve research, art, culture, and education, would fall squarely within the constitutional objectives that motivated the founders to enable the creation of copyright.

Thomas Jefferson would support this initiative, and Benjamin Franklin too.

*Pamela Samuelson
Richard M. Sherman Distinguished Professor of Law & Information
Berkeley Law, University of California*

The Internet Archive's proposal to digitize four million books would constitute the greatest single increase in accessible materials for the blind since the passage of the Pratt-Smoot Act, which created what is now the NLS, in 1931. It would benefit millions of blind people, both in the United States and around the world.

National Federation for the Blind

The more books that can be brought online, the more we can meet the goal of democratized access to knowledge and culture for all individuals and all communities. As individual libraries transform individual communities and individual lives, **an online library containing much of the cultural heritage of the Twentieth Century can help transform the world.**

American Library Association

Annually, **millions of undergraduate and graduate students would benefit** from this dramatic investment, replacing costly college textbooks with Open Educational Resources, on average saving students an estimated \$1000 or more per year.

*Martha Kanter, Ed.D., Executive Director
College Promise Campaign @CivicNation
U.S. Under Secretary of Education (2009-2013)*

Of all the incredibly worthy proposals you are considering as part of the 100&Change program, only the Internet Archive's—because of its focus on broad and socially just access to information, which is the chief driver of human creativity, liberty, and potential worldwide—promises to solve multiple problems **and be generative of an endless number of solutions.**

Digital Library Federation

Given HMH's long history, we are acutely aware that there are books and other historic materials that are no longer available for readers who may want to access them. Furthermore, there are readers today who do not even know that this important legacy of American literary history exists. We do not want this legacy to get lost and we are committed to preserving and making it accessible to all... The Internet Archive's Open Libraries will make HMH's books accessible to everyone, regardless of a reader's location, physical ability, or economic status.

Houghton Mifflin Harcourt

This effort breathes new life into older books, benefitting authors as well as readers around the globe.

*Amy Brand, Director
MIT Press*

Many organizations set ambitious goals. The Archive fulfills them. As a result, the Archive has become an invaluable resource for people all over the world.

Electronic Frontier Foundation



Brewster and his team understand big visions — something the MacArthur Foundation has demonstrated a remarkable ability to discover and support.

*Vint Cerf, VP and Chief Internet Evangelist
Google*

There is no organization on Earth more committed to creating, preserving and distributing our digital heritage. I say this as a former top engineering executive at Google and Facebook, as a co-founder of One Laptop per Child and its first CTO, and as a lauded technology innovator. When I die my estate is going to the Internet Archive.

Dr. Mary Lou Jepsen

Keeping valuable knowledge and creativity out of the reach of readers benefits no one. **For authors, the lack of an online version of their books can be tantamount to oblivion.** For readers, it restricts the universe of available knowledge and culture.

Authors Alliance

The Internet Archive's proposal maps out extraordinarily well a mechanism and process for all libraries to participate in a network that will support a vastly increased common collection—literally increasing that collection by several orders of magnitude for the average library.

*Dan Cohen
Northeastern University
former Director, Digital Public Library of America*

The Internet Archive's program, funded by the MacArthur Challenge, could be that **new bold idea**, one with global reach in our ever more connected society, **one focused on ensuring no one is left behind** in the race for greater access to knowledge, information access and technological enablement.

Boston Public Library



The proposal's objectives of increasing digital access to critical learning and research missing from the online environment matches up with the mission of the Los Angeles Public Library to provide free and easy access to information to enrich, educate, and empower every individual in our city's diverse communities. ... The misperception that all information is available for free on the internet illustrates the need for libraries to develop partnerships to make available the breadth of human knowledge in a digital format.

Los Angeles Public Library

This **critical linchpin of democracy** is imperiled by a copyright regime that has yet to catch up with the realities of digital access. The Internet Archive is offering a secure, scalable solution to this challenge while the socio-political system normalizes the access our democracy demands.

Abby Smith Rumsey

Our mission of access to information will be significantly furthered by this model, allowing us to share our collections beyond regional boundaries more broadly than has ever been possible, while at the same time **giving our local communities greater access to desired knowledge** held far away.

San Francisco Public Library

Without access to the cultures, histories and knowledges that are embodied in books, it is difficult to create reliable public knowledge, on sites such as Wikipedia. And as the internet becomes the default library of the world, and Wikipedia its default encyclopaedia, **the reality is that if you're not online... you don't exist.**

*Whose Knowledge?
a global, multi-lingual campaign to make knowledge on the internet
more diverse and plural*

Hundreds of thousands of volunteer Wikipedia editors would be able to include citations from 4 million additional eBooks, with live links that take readers directly into the books themselves, grounding them in the published record. **This project will weave a rich and reliable explanation of our world** into Wikipedia and the web for generations to come.

Wikimedia Foundation

We want to ensure that everybody in the world with a qualifying disability will have access to both the Open Library and Bookshare collections for free, expanding access to books for education, employment and social inclusion. **In short, creating a global free library for people with disabilities!**

Benetech

ISKME sees the project as advancing an unprecedented opportunity to advance open and freely available curriculum around digitized book content, as a primary outcome of this supported access.

The Institute for the Study of Knowledge Management in Education

One of the true joys of life is that derived from reading books. It is always a cherished memory of childhood, a building block of one's growing years and a fundamental part of adult life.

Unfortunately millions of persons with print disabilities around the world, more especially in developing countries around the APAC and other regions have severely limited access to books.

The project proposed by The Internet Archive to digitize millions of books in accessible formats is immensely important and timely for us.

Centre for Internet and Society

Content will be simple to get. Books that will otherwise be lost will remain in the human record.

Readers will benefit from access to free, valid and quality information, better able to explore, learn and develop intellectually and emotionally in a time when funding cuts threaten our ability to fulfill our vital mission.

*Readers First
a coalition of 300 library systems representing 200 million readers*

For the CNI community, we believe that this initiative would be very useful to print-disabled students who need access to a wide range of texts in their college or university program. Universities are under increasing pressure to provide accessible resources to their students and this large-scale program by IA would do much to assist their efforts.

Coalition for Networked Information

As Internet Archive makes these formats digital, new opportunities are created to deliver these into today's classrooms and enable **libraries to add their strengths** in addressing the needs of struggling readers.

Learning Ally

How can we leverage the extraordinary presence of almost 120,000 libraries in the United States to build literate and knowledgeable communities—the surest, and most cost-effective path to a self-sustaining society? Your very innovative approach, using existing technologies, and respecting author's rights, is **among the most promising directions I have seen.**

*James LaRue, Office for Intellectual Freedom
American Library Association*

The proposed project to bring 4 million books online and ensure they are available to the print disabled around the world would make a major difference to many blind and visually-impaired people in their ability to access the world's knowledge. **Access to information helps provide personal independence, is necessary to succeed in education and employment and essential to participating in society.**

LightHouse for the Blind and Visually Impaired

This project allows the sharing of collections and **creates a new model that recognizes the importance of both copyright and provenance.**

Just as importantly, this project has the potential to realize enormous cost savings to libraries, savings that can go into building collections instead of slowly and laboriously moving physical materials.

Sacramento Public Library

We place a high priority on offering a rich and relevant collection, but libraries are for people and should not be warehouses for books in the modern age. As a library with increasing demands on our spaces for community connections, group learning opportunities and more; Libraries should not be book warehouses, but community forums.

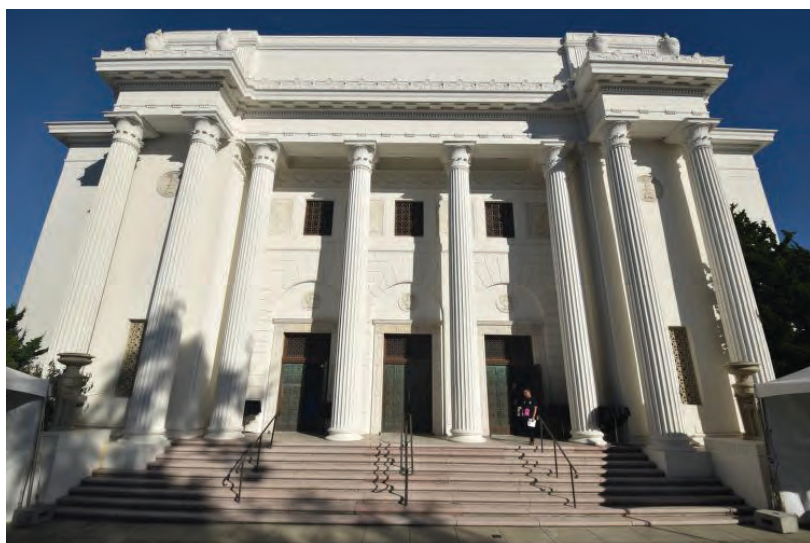
Multnomah County Public Library (Portland, OR)

The project outlined by the IA in their *100&Change* proposal holds the promise of bridging one of the most dangerous divides of our time: an informational divide caused by the growing economic inequality in the United States.

Michelle Wu, Georgetown University Law Center

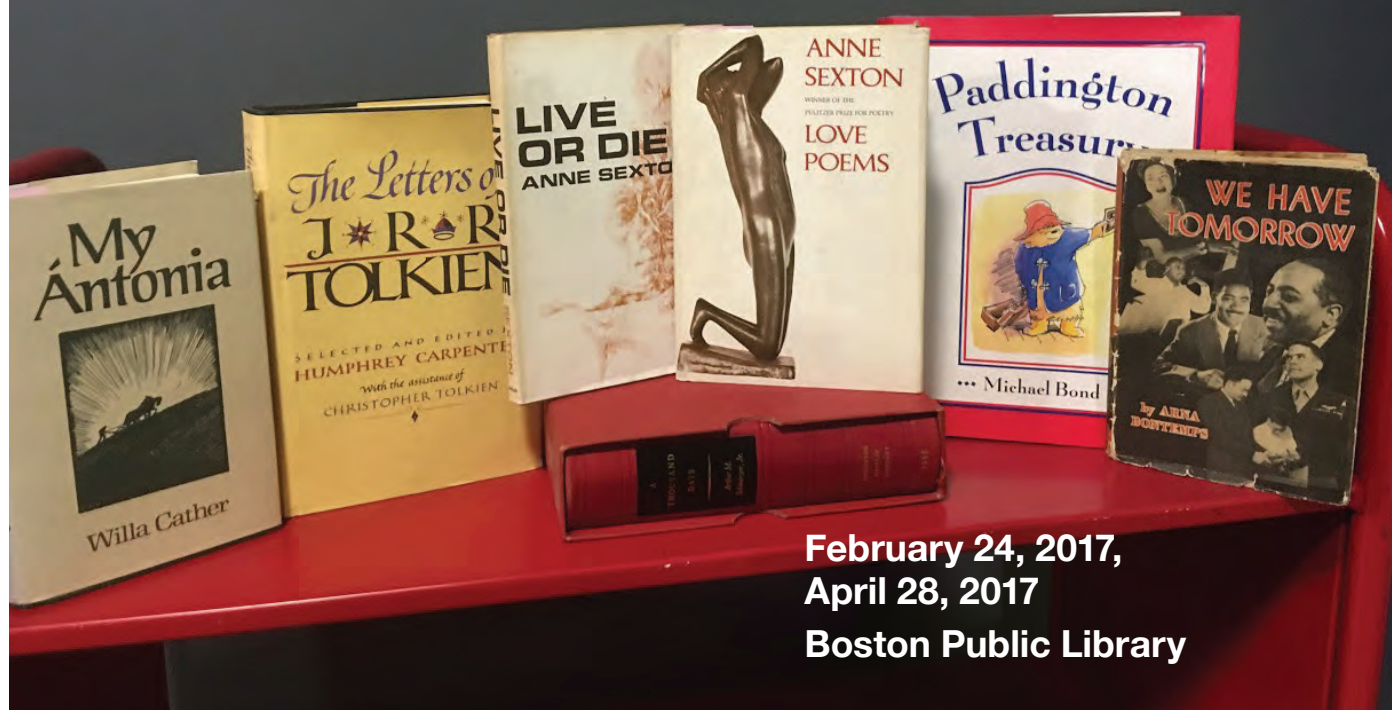
Evidence of Engagement

Photos from Key Convenings





Meeting at Boston Public Library with Houghton Mifflin Harcourt



**February 24, 2017,
April 28, 2017
Boston Public Library**

"We are thrilled to ally ourselves with a project that will make our 19th and 20th century history available through 21st century technology. This project aligns perfectly with our mission to improve educational outcomes in underserved communities, foster curiosity, and provide materials easily and at no cost to learners of all ages. We wholeheartedly support it."

**--John Lynch, Jr. President and CEO,
Houghton Mifflin Harcourt**

These are some of the tens of thousands of classic books from Houghton Mifflin Harcourt's publishing history, dating back to 1852. HMH's authors include some of the world's most renowned women writers and poets. They are the publishers of Orwell, Sexton, Galbraith, Tolkein, and Paddington Bear.

Copyright Scholars Meeting

May 24, 2017
San Francisco, CA

Twenty copyright experts, gathered in San Francisco, listen to their remote colleague, **Jason Schultz**, Director of NYU's Technology Law & Policy Clinic.



Peter Jaszi, Professor Emeritus at American University's Washington College of Law (right) debates the issues with **Krista Cox**, of the Association of Research Libraries (left) and **Carrie Russell** of the American Library Association (center).



Pam Samuelson, the Richard M. Sherman Distinguished Professor of Law at University of California, Berkeley, sets the agenda at the copyright scholar's gathering.

20 of the nation's top copyright scholars gathered in San Francisco to consider controlled digital lending by libraries and fair use—the legal foundation for the *Open Libraries* model.



Open Libraries Copyright Workshop

Date: May 23-24, 2017

Location: Denton's Law Offices, One Market Street, San Francisco, CA 94104

Pamela Samuelson, Professor of Law and Information at the University of California, Berkeley, School of Law, convened a gathering of Copyright and Fair Use experts to consider the digitize and lend model that the Internet Archive is proposing to expand through the MacArthur Foundation's 100&Change grant.

The workshop opened with an overview of the Internet Archive's Open Libraries project. Following that introduction, participants leapt into a robust discussion of the copyright issues raised by the project and the legal basis of the project in relation to the Constitutional objectives that motivated the founders' creation of copyright.

Participants:

Aaron Perzanowski

Professor of Law
Case Western Reserve University School of Law

Brewster Kahle

Founder and Digital Librarian
Internet Archive

Brianna Schofield

Executive Director
Authors Alliance

Carrie Russell

Director, Program on Public Access to Information
American Library Association

Corynne McSherry

Legal Director
Electronic Frontier Foundation

David Hansen

Director of Copyright and Scholarly Communication
Duke University Libraries

Greg Cram

Associate Director of Copyright and Information Policy
New York Public Library

Jason Scultz (remote)

Professor of Clinical Law and Director of the Technology Law & Policy Clinic
New York University School of Law



Jim Michalko
Senior Strategist
Internet Archive

Joe Gratz
Vice-chair of the American Bar Association IP Section's Committee on Copyright & New Technologies
Durie Tangi, LLP
University of California, Hastings College of the Law

John Gonzalez
Director of Engineering and Service Availability
Internet Archive

Kathy Hashimoto
Copyright Research Fellow
Berkeley Center for Law & Technology

Krista Cox
Director of Public Policy Initiatives
Association of Research Libraries

Kyle Courtney
Copyright Advisor
Harvard University

Lila Bailey
Legal Counsel
Internet Archive

Lydia Loren
Professor of Law
Lewis and Clark Law School



Mary Minow
Fellow, Harvard Advanced Leadership Initiative
Board Member, Institute of Museum and Library Services

Michelle Wu
Associate Dean for Library Services and Professor of Law
Georgetown University Law Library

Molly Van Houweling (remote)
Professor of Law, Associate Dean, and Co-Director of the Berkeley Center for Law & Technology
University of California, Berkeley, School of Law

Pamela Samuelson
Professor of Law & Information and Co-Director, Berkeley Center for Law & Technology
University of California, Berkeley, School of Law

Peter Jaszi
Professor of Law
American University Washington College of Law

Stanley Sater
Graduate Student
Tulane University

Tomi Aina
Graduate Student
Tulane University

Tony Reese (remote)
Professor of Law
University of California School of Law

Wendy Hanamura
Director of Partnerships
Internet Archive





Meeting with Dr. Carla Hayden, 14th Librarian of Congress

April 21, 2017
San Francisco, CA

Dr. Carla Hayden, Librarian of Congress, holds a digital copy from OpenLibrary.org of her favorite book *Bright April*, by Marguerite de Angelia (1946); with **Brewster Kahle** at the San Francisco Public Library. Earlier this year, the *Open Libraries* team met with Dr. Hayden at the Library of Congress, the world's largest library to discuss digitization strategies.

"It meant a lot to see a little brown, rather skinny girl, in a Brownie outfit, complete with the beanie—and that's what I had on. Books should be mirrors, and they should be windows."

**--Dr. Carla Hayden,
Librarian of Congress,
talking about her favorite
book "Bright April"**



Dr. Hayden often talks about *Bright April*, a story about a young African American girl who experiences difficult lessons about racial prejudice. *Open Libraries* plans to curate more diverse stories like this one to add to the nation's digital library shelves.



American Library Association Annual Meeting

June 21-26, 2017
Chicago, IL

Some of the library stakeholders calling for a collaborative strategy for controlled digital lending.

"I have focused throughout my forty-two years of professional work on expanding the accessibility and usability of information through technology...The Internet Archive, throughout its distinguished history, has always been a leader in this arena, setting the standards for access to digitized materials."

Jim Neal, President, American Library Association



The board of the **Public Library Association** met to learn and offer feedback on IA's Open Libraries initiative. During the board meeting, two board members pledged their library's participation in the project: Sacramento Public Library and Multnomah County, OR.



During a hectic Annual meeting with 38,000 participants, the **American Library Association Board of Directors** met to consider *Open Libraries*; they gave it the Association's full endorsement.



The Association of Specialized and Cooperative Library Agencies (**ASCLA**)'s **Consortial Ebook Interest Group** meeting at ALA drew 70 active participants. These are the national decision makers leading ebook strategies for their states.



Open Libraries

a project by the Internet Archive

Internet Archive

**Photo
Gallery**

MIT Press Meeting

April 28, 2017
Cambridge, MA

*“...this is an incredibly
important effort of
vast proportions and
world-changing
potential...”*

Amy Brand,
Director, MIT Press



Kelly Macdougall, Digital Products Coordinator and Director, **Amy Brand** holding one of the award-winning titles from MIT Press' deep backlist— soon to be digitized and lent at archive.org.

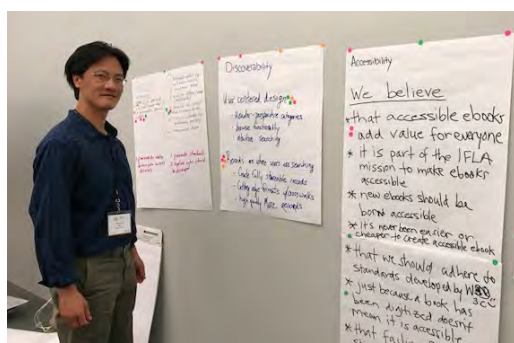
Some of the classic titles from science, architecture and art from MIT Press' 80 years of publishing that will soon be available for lending thanks to a grant from **Arcadia**. When complete, any US library that owns a MIT Press title will be able to offer digital—or physical—access to its many patrons.



Amy Brand, Director of the MIT Press, and **Wendy Hanamura** meet in Cambridge, MA to plan the launch of the digitize-and-lend project. MIT Press became the first university press to scan its classic titles and lend them through libraries.

DPLA (Digital Public Library of America) Fest

April 201, 2017
Chicago, IL

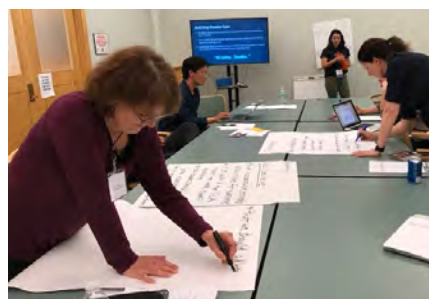


Brenton Cheng,
IA Senior Engineer,
reports back to
the group at a
brainstorming
session on ebooks
and accessibility
at DPLA Fest.

"As a partner (in Open Libraries,) DPLA brings a rich network of 2,500 libraries, museums and archives that are passionate about expanding the breadth and depth of digitized materials to their patrons."

Michele Kimpton, Acting Executive Director, DPLA

Micah May, IA Ebook Strategist, mapping the future of ebooks to a roomful of ebook consortia.



How do we make books more accessible?
That was the topic of one brainstorming session IA joined at DPLA Fest.

Technology and Social Change (TASCHA) Group Summit on “Libraries as Platforms of Civic Engagement”

May 9-11, 2017
Seattle, WA



John Palfrey, Head of School at Phillips Academy; **Ana Mari Cauce**, President of the University of Washington; **Carol Palmer**, Professor and Associate Dean for Research at the University of Washington Information School; and **Chris Coward**, Director of the Technology & Social Change Group at the University of Washington.

Global library leaders, Gates Foundation staff, and University of Washington Information School professors spend time with **Wendy Hanamura**, IA Director of Partnerships, to offer insights and suggestions for *Open Libraries*.

This project offers a unique, large-scale opportunity to provide access to this data through a systematic approach that the research and practice communities can use to investigate and improve the delivery and use of digital knowledge.”

Harry Bruce, Dean and Professor,
University of Washington
Information School



100&Change Advisors Dinner

March 31, 2017
San Francisco, CA

“For digital natives, online access—be it on the web, through apps, or via cloud services—is the default mode of reading. If a book is not accessible on-line, it will not be found and used.”
Abby Smith Rumsey

At a dinner for West Coast advisors, **Brewster Kahle** presents an overview of 100&Change and the progress of *Open Libraries*.

100&Change Advisors Dinner at ALA Annual

June 24, 2017
Chicago, IL

A gathering of *Open Libraries* east coast partners and advisors during the ALA Annual in Chicago. The spirited conversation drew from the legal scholars, social scientists, librarians, engineers, authors, publishers and MacArthur staff who attended.





Access to Knowledge in India and America

June 14, 2017
San Francisco, CA



“Let’s bring down the barriers and democratize information to educate and enhance quality of life for the people at the bottom of the economic pyramid in rural areas and in disabled communities.”

Dr. Sam Pitroda

Brewster Kahle and Carl Malamud with Dr. Sam Pitroda (center), widely regarded as the father of modern communications in India. He helped “bring a phone to every village,” vastly improving the lives of every Indian.

Brewster Kahle; Hon. Ambassador **Venkatesan Ashok**, Consul General of San Francisco; and **Carl Malamud**, Founder, Public.Resource.org listen to **Dr. Sam Pitroda**, at the dedication of the Digital Library of India Collection. This collection of 465,000 ebooks in 50 languages is now available on archive.org. These books were originally digitized as part of the NSF-funded “Million Books Project.” We have become the long-term preservation partner for this government-funded project.





Whose Knowledge? Dalit Edit-a-thon

**April 15, 2017
Berkeley, CA**

Anasuya Sengupta and **Siko Bouterse**, co-founders of Whose Knowledge? almost hidden behind a stack of books related to Dalit culture for this editing session. With IA, they hope to bring these critical resources online.

***“Why does the majority of the world not have voice and visibility on Wikipedia and the broader internet? One critical reason is that most of the world does not have easy access to knowledge -- to the sources”
--Anasuya Sengupta and Siko Bouterse, co-founders of Whose Knowledge?***



IA Advisor, **Anasuya Sengupta**, collaborates with a fledgling Wikipedia editor to bring Dalit histories into relevant Wikipedia articles.



Wendy Hanamura and **Heather Wallis**, Communications Director of the Wikimedia Foundation collaborate to improve a Wikipedia article on Dalit history by linking citations to their sources.

Evidence of Engagement

Letters of Support



Open Libraries **Letters of Support**

- Pamela Samuelson** 119
- Samuelson is the Richard M. Sherman Distinguished Professor of Law at the University of California, Berkeley. She is an intellectual property scholar and co-director of the Berkeley Center for Law and Technology. She was a MacArthur Fellow in the class of 1997.
- American Library Association** 123
- The ALA is a member organization representing 58,000 member libraries of all types —academic, public, school, and special— in the U.S. and more than 100 other nations.
- Digital Library Federation** 125
- The Federation represents 162 research and memory institutions housing significant digital initiatives and works to advance research, learning, social justice, and the public good through the creative design and use of digital library technologies.
- National Federation of the Blind** 127
- NFB is the oldest and largest nationwide organization of blind people and a leading advocate for equal access to information by the blind.
- San Francisco Public Library** 128
- Coalition for Networked Information** 130
- CNI is a non-profit program of the Association of Research Libraries and EDUCAUSE. With more than 240 institutional members, EDUCAUSE is dedicated to supporting the transformative promise of digital information technology for the advancement of scholarly communication. .
- Houghton Mifflin Harcourt** 132
- Authors Alliance** 133
- The Authors Alliance represents more than 1,200 authors who want to take advantage of digital age opportunities to share their creations with readers, promote the ongoing progress of knowledge, and advance the public good.

MIT Press	135
Wikimedia Foundation	136
The Wikimedia Foundation is a non-profit that supports and operates Wikipedia, Wikimedia Commons, Wikidata, and other free knowledge projects.	
Public Library Association	138
PLA works with 9000+ member libraries to enhance their abilities to provide an array of services to their communities.	
Digital Public Library of America	139
The DPLA is a network of 2,500 libraries, museums, and archives working to expand the breadth and depth of digitized materials.	
Califa	140
Califa is a non-profit library consortium representing 230 libraries in California. It is a recognized leader in e-content advocacy, access, and innovation.	
ReadersFirst	142
ReadersFirst is a open and cost-free organization dedicated to ensuring access to free and easy-to-use ebook content. They represent 300 library systems and 200 million readers across the globe.	
American Library Association Office for Intellectual Freedom	143
The Office of Intellectual Freedom implements ALA policies concerning the concept of intellectual freedom as codified in the Library Bill of Rights.	
Northeastern University Libraries	144
This library is led by the former director of the Digital Public Library of America.	
Benetech	146
Benetech's Bookshare online library is the largest library for people with disabilities such as blindness or dyslexia.	

- Center for Internet and Society** 147
- CIS is a non-profit organization that does policy and academic research on internet and digital technologies. Main areas of focus include digital access for persons with disabilities, access to knowledge, intellectual property rights, openness, and digital privacy.
- Learning Ally** 148
- Learning Ally is a national non-profit dedicated to helping students with print disabilities, including blindness, visual impairment, and dyslexia, learn at home and in the classroom.
- LightHouse for the Blind** 149
- The LightHouse promotes social equality and independence through providing training, education, advocacy, and community for blind individuals in California and around the world.
- Dr. Sam Pitroda** 150
- Pitroda has dedicated his life to broadening access to information and bridging the digital divide in developing countries, in particular in India. He is an advocate in particular for those with print disabilities, including India's 15 million blind.
- Whose Knowledge?** 151
- Whose Knowledge? is a global, multi-lingual campaign to make knowledge on the internet more diverse and plural.
- Martha Kanter** 153
- Kanter served as the U.S. Under Secretary of Education from 2009-2013 under President Obama and is a founder of the College Promise Campaign at Civic Nation.
- The Institute for the Study of Knowledge Management in Education** 155
- ISKME is an independent education non-profit whose mission is to improve the practice of continuous learning, collaboration, and change in the education sector.
- University of Alberta** 156

New Knowledge Organization, Ltd. 157

New Knowledge is an interdisciplinary social sciences think tank collaborating with changemakers to build a strong, healthy democracy and thriving biosphere. NKO will serve as an independent external evaluator to monitor the Open Libraries initiative.

University of Washington Information School 159

The ISchool is home to researchers who recognize that access to and effective use of information is key to building a better world. A partner to the Internet Archive, ISchool researchers design solutions to complex information challenges.

Boston Public Library 161**Los Angeles Public Library** 163**Sacramento Public Library** 165**Chicago Public Library** 167**New York Public Library** 168**Multnomah County Library (Portland, OR)** 169**Michelle M. Wu** 170

Wu is the Associate Dean for Library Services and Professor of Law at Georgetown Law where her research focuses on copyright, intellectual property licensing, and information management.

Mary Lou Jepson 172

Jepson has served as a top engineering executive at Google and Facebook. She is one of the co-founders of One Laptop per Child and its first CTO.

Abby Smith Rumsey

174

Rumsey is a writer and historian focused on the creation, preservation, and use of the cultural record in all media. She has worked at the Library of Congress, the Council on Library and Information Resources, and the Scholarly Communication Institute at the University of Virginia.

Electronic Frontier Foundation

177

EFF is a non-profit organization defending civil liberties in a digital world. Their work includes policy, litigation, grassroots activism, and technology development in pursuit of use privacy, free expression, and innovation.

Vint Cerf

179

Cerf is a VP and the Chief Internet Evangelist at Google. Widely known as a “Father of the Internet,” Cerf co-designed the TCP/IP protocols and the architecture of the internet.

28 June 2017

John D. and Catherine T. MacArthur Foundation
140 S. Dearborn Street
Chicago, Illinois 60603
Attn: Board of Directors

Re: 100&Change – letter of support for the Internet Archive

To the MacArthur Foundation Board Members:

I am pleased to offer this letter to support the Internet Archive (IA) in the Foundation's 100&Change competition. IA's Open Libraries initiative to create a free, online collection of four million books presents an at-scale solution to a global problem, namely, that in this digital age we have not yet succeeded in bringing our vast resources of information online for broader public access. At present, only a small percentage of our accumulated heritage is available online than could be or should be. IA and Open Libraries, under the auspices of the 100&Change grant, would make major strides towards addressing this problem by providing far greater public access to the contents of books from library collections in digital form. Many, and perhaps most, of these books are currently underutilized because they exist only in analog form and can only be obtained by physical presence in library facilities. The framework established by Open Libraries will not only promote efficient growth and expansion of a major database containing much of the cultural heritage of the 20th century, but will also serve affiliated libraries around the U.S. and be a model for other digital library initiatives. It will provide long-lasting and far-reaching public welfare benefits for generations to come.

As an intellectual property scholar, I have been greatly influenced by the aspiration the nation's founders built into the Constitution. The founders gave Congress the power "to promote the progress of science and useful arts" by granting exclusive rights for limited times to the original writings of authors. In Thomas Jefferson's day, these rights—collectively called copyright—lasted only fourteen years, and could be renewed for only fourteen additional years. If copyright had the same duration today as back then, all works of authorship created before 1990 would be in the public domain and freely available for reproduction and dissemination. Copyright lasts longer than that nowadays, and makes it more difficult for libraries to carry out their historically important mission to enable public access not only to public domain materials, but also to in-copyright works. A project such as now envisioned by IA's Open Libraries, with its aim to enable free public access to millions of digital books that would serve research, art, culture, and education, would fall squarely within the constitutional objectives that motivated the founders to enable the creation of copyright. Thomas Jefferson would support this initiative, and Benjamin Franklin too.



I've been working with Brewster Kahle and IA for more than a decade to provide support and guidance for the creative efforts IA has made to respect and work within the rules of copyright while at the same time providing as much access to creative works as fair use and other flexible doctrines of copyright permit. By partnering with other libraries and enabling them to lend digital copies of works in their physical collections, IA's mission "to provide Universal Access to All Knowledge" will be much furthered.

The Open Libraries Project reflects IA's ongoing commitment to ensuring better access to information for all. IA started with archiving the contents of open sites in today's digital networked environment. It went on to make available a wide range of additional information resources such as television news broadcasts and other video and audio recordings, still images, and software programs. This lofty undertaking expanded logically to digitizing books. As I wrote in 2011, "A digital library containing all the world's knowledge is a laudable goal; just ask Brewster Kahle, who established the Internet Archive in 1996, years before Google was founded, and who has worked tirelessly to create it as a non-profit true digital library."¹

IA's efforts have intersected with my own academic and professional interests. Over the course of my thirty-plus-year-career as a scholar, educator, and advocate, especially at Berkeley Law where I teach courses in intellectual property law and serve as co-director of the Berkeley Center for Law & Technology, my research and writings have explored the boundaries of intellectual property law and the challenges posed by new information technologies.² Securing broad public access to our cultural heritage through mass digitization is a particularly compelling issue, one that I have focused on throughout the past decade.

My professional interest in mass digitization was first piqued by the Google Book Search project and then by the lawsuit that the Authors Guild brought against Google. When Google, the Guild, and the Association of American Publishers proposed a settlement that would have created a digital library of millions of books that would be publicly accessible, I was supportive of the overall goal, but not of the means the settling parties planned to use to achieve it. Contrary to Sergey Brin's claim, the Google Book settlement would not have created a library to last forever, but rather a shopping mall whose commercialization of books and destruction of reader privacy would have created a monster. IA and I objected to this settlement, in part because it would have allowed Google—and only Google—to commercialize all out-of-print books in the world. I filed objections to the settlement on behalf of academic authors because the Authors Guild did not adequately represent our interests in the negotiations. After that settlement failed, I supported Google's fair use defense by filing a brief *amicus curiae* with the courts to explain why Google's fair use defense should succeed, as it ultimately did.

Although I opposed the Google Books settlement, I have been working hard since then to figure out a way to achieve the laudable goal of the proposed settlement—to enable millions of books to be available online to as broad a public as possible—while respecting copyright and enabling nonprofit public libraries to provide greater public access to the accumulated knowledge of humankind. While technological and financial obstacles to creating a comprehensive digital library are not trivial, copyright may be the most confounding hurdle of all, due in part to the complex rights copyright law confers on owners and because copyright terms are so long. Thus the question remained: how to do it?

¹ Pamela Samuelson, "Google Books Is Not a Library," *Huffington Post Blog*, Mar. 18, 2010 (updated May 25, 2011), http://www.huffingtonpost.com/pamela-samuelson/google-books-is-not-a-lib_b_317518.html.

² My c.v. and list of published works are available on the Berkeley Law website: <https://www.law.berkeley.edu/our-faculty/faculty-profiles/pamela-samuelson/>.

To that end, my work has addressed copyright challenges for digital libraries and mass digitization projects. I have written, for instance, about fair use as an enabler of broad public access to orphan works, digital lending, and greater access for print-disabled persons. My commitment to fostering greater public access to knowledge motivated me to serve, from 2011 to 2014, as a principal investigator of the Berkeley Digital Library Copyright Project, which was funded by a Sloan Foundation grant. This three-year project focused on how to overcome the copyright obstacles faced by libraries in the digital age.³ Over the course of the Project, we explored the issues and concerns of library communities and other stakeholders about copyright issues, working with librarians at the University of California, University of Michigan, Harvard University, among others, as well as with library associations in the U.S. and beyond in our research initiatives. We also hosted academic symposia and workshops. Brewster Kahle, IA's Founder, was on the Project's advisory board and participated in several Project events. Our outputs included a series of reports, articles, white papers, and written comments to the U.S. Copyright Office and others, communicating views about how copyright obstacles might be overcome and how coalitions of support for the initiatives to overcome the obstacles might be built. The Project also supported several workshops and conferences to bring together the best minds in the U.S. to address copyright issues posed by mass digitization.

One of the objectives of the Digital Library Copyright Project was to facilitate actual, real-world applications. As an advisor to IA's Open Libraries project, I and other intellectual property law scholars, practicing attorneys, and university research and public library professionals have discussed practical strategies for architecting a large-scale digital library system such as that envisioned by IA. There are a series of measures that IA can take to creatively increase public access without breaking copyright rules. This project will be especially useful to promote public access to older works that are no longer commercially available, and to provide access to underserved communities such as blind and print-disabled users, all while observing traditional library principles such as safeguarding reader privacy. As a nonprofit organization, IA could operate with greater transparency and promote the public interest better than commercial platforms such as Google, Amazon, or Facebook could in running a digital book marketplace.

In addition, as a co-founder of Authors Alliance, a 501(c)(3) not-for-profit organization dedicated to promoting authorship for the public good by supporting authors who write to be read, to be seen, and to be heard, I have a direct interest in broadening public access to my own work and the works of our 1200 members. The Alliance's mission is to further the public interest in facilitating widespread access to works of authorship.⁴ The organization has developed a guide to rights reversions for authors who want to reclaim copyrights in their works. We plan to work with IA to help it spread the word about the advantages of rights reversions as a tool to enable broader public access to older but still culturally valuable works. We are working on resources and tools designed to help authors better understand and manage key legal, technological, and institutional aspects of authorship in the digital age.

³ The Project is digitally archived on the Berkeley Law website:
<https://www.law.berkeley.edu/experiential/clinics/samuels-law-technology-public-policy-clinic/digital-library-copyright-project/> (research and project outputs can be accessed by clicking on the link in the menu bar on the right side of the page).

⁴ More information from and about Authors Alliance can be found on its website:
<http://www.authorsalliance.org/>.

I hope this letter has conveyed the steady development of interest and support for projects such as IA's Open Libraries. Throughout the United States and abroad there are authors, scholars, educators, students, readers and other individuals, libraries and other institutions, all who share with IA a unified vision of a modern library system providing broad public access to knowledge. The 100&Change grant can make possible a marshalling of such communal commitment that just a few years ago might have seemed impossible. The more books that can be brought online, the closer the goal of democratized access to knowledge and culture for all communities can be attained.

We are at a historic moment: Brewster Kahle and the Internet Archive are attempting to do something profoundly important. Let us all work together to move this worthy project further forward and help this and coming generations connect to the world's knowledge.

Thank you for your time and attention. I am happy to provide further information if necessary.

Sincerely,

A handwritten signature in black ink, appearing to read "Pamela Samuelson". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

Pamela Samuelson
Richard M. Sherman Distinguished Professor of Law & Information

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James G. (Jim) Neal
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ALA American Library Association

July 11, 2017

John D. and Catherine T. MacArthur Foundation
140 S. Dearborn Street
Chicago, Illinois 60603
Attn: Board of Directors

To the MacArthur Foundation Board Members:

On behalf of the American Library Association, I am pleased to offer this letter of support for the Internet Archive's 100&Change Open Libraries proposal to the MacArthur Foundation to create a free, online collection of four million books.

Despite technological advances in information delivery, the vast majority of digital resources are not currently available to the public in this country and across the world. This is particularly true of printed book materials, the majority of which are housed in libraries where these materials are only available to those who can physically access them. This lack of access negatively impacts research, education and economic development both here in the US and abroad.

The Internet Archive and Open Libraries project would address this problem by providing digital access to the contents of books from library collections. The more books that can be brought online, the more we can meet the goal of democratized access to knowledge and culture for all individuals and all communities. As individual libraries transform individual communities and individual lives, an online library containing much of the cultural heritage of the Twentieth Century can help transform the world.

The 58,000 members of the American Library Association represent tens of thousands of libraries of all types – academic, public, school and special – here in the United States and in over 100 countries around the world. Working together over the last 140 years, ALA has led the way in providing “leadership for the development, promotion, and improvement of library and information services... in order to enhance learning and ensure access to information for all.”

This work has included the introduction of many advances in library and information services over the years, and has increasingly focused on increasing access to information and learning through use of digital technologies. With the advent of the Internet, we have led efforts to make print materials available online. This has included working with publishers to increase public access to published books.

On a personal note, I have focused throughout my forty-two years of professional work on expanding the accessibility and usability of information through technology. This has included numerous initiatives in mass digitization, delivering and preserving critical resources for a global audience. The Internet Archive,

throughout its distinguished history, has always been a leader in this arena, setting the standards for access to digitized materials and to born digital resources.

Thank you for your time and attention. I would be happy to provide further information if necessary.

Sincerely,

A handwritten signature in dark ink that reads "James G. Neal". The signature is written in a cursive style with a large, stylized initial "J".

James G. Neal
President
American Library Association



COUNCIL ON LIBRARY AND INFORMATION RESOURCES
1707 L STREET NW, SUITE 650, WASHINGTON DC 20036-4201
Telephone: 202.939.4750 • CLIR: www.clir.org • DLF: www.diglib.org
— The Digital Library Federation is a program of CLIR —

29 June 2017

Board of Directors
John D. and Catherine T. MacArthur Foundation
140 S. Dearborn Street
Chicago, IL 60603

Re: Internet Archive Proposal, 100&Change

Dear MacArthur Foundation Board Members,

I write on behalf of the **Digital Library Federation (DLF)** to express our professional community's enthusiastic support for the Internet Archive's *Open Libraries 100&Change* proposal—but more than that, to offer the complete commitment of DLF's leadership and active working groups to helping the project succeed, through an innovative partnership we're calling "Inclusive Curation."

The Digital Library Federation was founded in 1995 and currently represents 162 institutions—colleges and universities housing research libraries and significant digital initiatives; public libraries, museums, and other cultural heritage organizations using technology to reach new audiences; and government agencies, archives, research labs, and nonprofits with holdings to share and ambitious information access goals. DLF member organizations and the engaged faculty, staff, and students within them come together with a broad, international digital library practitioner community extending well beyond our institutional membership to develop new systems and best practices in support of a common DLF mission. Together, we *advance research, learning, social justice, and the public good through the creative design and wise application of digital library technologies*.

We do this because digital libraries are the essential intellectual infrastructure of the 21st century.

And, just like the brick-and-mortar libraries whose collections feed them, digital libraries are only as rich, expansive, and generative as the content they house. The Internet Archive's proposal to remediate four million minimally-accessible print-bound volumes into digital form, freely placing them in the hands of readers, teachers, seekers, and learners, will not only help realize the potential of libraries to transfer knowledge across generations and to audiences barely anticipated at the moment of a book's production—it will open up a world of learning to members of communities who have been unjustly shut out of information access, because of quirks of geography, economic and social inequities, or physical/cognitive disability, including those for whom print will never be an accessible medium. What will these individuals and

communities do with greater access to information? What discoveries and breakthroughs will they achieve? What new art and literature will they be inspired to create? What changes will they make in the world? We're excited to find out.

But this project is not just an opportunity to make 4 million books widely accessible in new forms. It is also a chance to be radically more thoughtful about matters of diversity, equity, and inclusion in the digital collections we create—an issue that has never been more pressing on the American scene and which we see as fundamental to MacArthur's global vision to create a more just, verdant, and peaceful world. DLF's contribution to the *Open Libraries* project will be to design model digitization selection processes and workflows in alignment with our deep commitment to social justice and the common good, developing shared practices and understandings that will serve diverse information communities better, now and into the future. We are eager to integrate an IA/100&Change "Inclusive Curation" platform and toolkit into the dashboard of related digital library design and assessment tools our DLF working groups are currently developing to make freely available to the worldwide digital library community.

"Inclusive Curation" will be guided by our energetic DLF Cultural Assessment working group, chaired by Hannah Scates Kettler, who joins me on the advisory board for IA's proposal. It will serve to coordinate the efforts of various Internet Archive curatorial partners, helping to make their book selection decisions transparent and open to a user-friendly mechanism for public feedback on matters of diversity and representation. DLF's goal is to establish and promote a welcoming, community-responsive form of book selection for the Internet Archive project that ultimately results in fewer homogenous collections—and in digital libraries that better represent and share the lived experiences of readers and writers with differing cultures, lifestyles, orientations, interests, and local or indigenous knowledge. Because of the prominence and reach of our two organizations in the global digital library community, DLF and IA are confident our toolkits, resources, and collaboration on "Inclusive Curation" within *Open Libraries* can serve as a model for the creation of more diverse and democratized digital collections everywhere.

Of all the incredibly worthy proposals you are considering as part of the 100&Change program, only the Internet Archive's—because of its focus on broad and socially just access to information, which is the chief driver of human creativity, liberty, and potential worldwide—promises to solve *multiple problems* and be generative of *an endless number of solutions*.

The Digital Library Federation is proud to support this project, and I urge you to do the same.

Sincerely,

A handwritten signature in black ink, appearing to read "Bethany Nowviskie". The signature is fluid and cursive, with the first name "Bethany" written in a larger, more prominent script than the last name "Nowviskie".

Bethany Nowviskie, MA Ed., Ph.D.
Executive Director of the Digital Library Federation,
Council on Library and Information Resources;
and Research Associate Professor of Digital Humanities, University of Virginia



July 7, 2017

John D. and Catherine T. MacArthur Foundation
140 S Dearborn Street
Chicago, IL 60603-5285

Dear MacArthur Foundation Board Members:

The National Federation of the Blind urges The MacArthur Foundation to award the 100&Change grant to the Internet Archive in order to provide libraries and learners free digital access to over four million books. The National Federation of the Blind is the oldest and largest nationwide organization of blind people and the leading advocate for equal access to information by the blind. Every day we raise the expectations of blind people, because low expectations create obstacles between blind people and our dreams.

Despite the technological feasibility of converting print books into accessible formats like Braille, audio, and digital copies, which is easier to do now than it has ever been, over 95 percent of published works are unavailable to people with print disabilities. Even though the National Library Service for the Blind and Physically Handicapped of the Library of Congress (NLS) makes accessible books available to blind people on a national scale and some electronic booksellers, like Apple and Amazon, are producing accessible ebooks, too many publishers remain technically unable or simply unwilling to make their materials accessible.

Literacy and knowledge are critical to equal participation in society and to a productive and fulfilling life. The scarcity of accessible books means that print-disabled people have been unable to learn, work, and enjoy life to as great an extent as their non-disabled counterparts. They may be unable to complete research for school, progress in their career, or fully participate in cultural life.

For these reasons, the National Federation of the Blind urges The MacArthur Foundation to award this grant to the Internet Archive. The Internet Archive's proposal to digitize four million books would constitute the greatest single increase in accessible materials for the blind since the passage of the Pratt-Smoot Act, which created what is now the NLS, in 1931. It would benefit millions of blind people, both in the United States and around the world.

Sincerely,

Mark A. Riccobono, President
National Federation of the Blind



San Francisco Public Library

City Librarian's Office

100 Larkin Street, San Francisco, CA Phone: (415) 557-4236

June 27, 2017

Board of Directors

John D. and Catherine T. MacArthur Foundation

140 S. Dearborn Street

Chicago, IL 60603

SUBJECT: Internet Archive Proposal for 100&Change

Dear MacArthur Foundation Board Members,

I am writing to express San Francisco Public Library's strong endorsement of the Internet Archive's Open Libraries Project, and to convey our intent to support, advise and fully participate in this initiative. Our mission of access to information will be significantly furthered by this model, allowing us to share our collections beyond regional boundaries more broadly than has ever been possible, while at the same time giving our local communities greater access to desired knowledge held far away. Equity is one of our primary values and this project addresses critical issues of access for people who do not share the benefits of a well-funded urban library system such as ours.

San Francisco Public Library was one of 100 partners that participated in the Internet Archive's Open Libraries prototype and for us, this project represents a logical and dramatic scaling of that work.

Collections we particularly want to share include:

- Extensive San Francisco, Bay Area, California and the West collections: Our Daniel E. Koshland San Francisco History Center is the official archive of the City and County of San Francisco and documents all aspects of San Francisco life and history and to a lesser extent, the San Francisco Bay Area, California and the West, from its earliest days to the present. These collections cover important subject areas for the K-12 state curriculum, such as books about the California Missions. SFPL holdings also include City and County of San Francisco government document monographs that have yet to be digitized.
- Effie Lee Morris Historic and Research Collection of Children's Literature: This collection of over 15,000 books emphasizes outdated or out-of-print books considered important to children's literature and books containing ethnic stereotypes. It includes the Changing Portrayals Collection of Ethnic and Social Groups with an Emphasis on Pacific Rim Peoples as well as complete collections of Newbery and Caldecott Award winners.

- American and European history: An extensive collection on American and European history with books published starting in 1900. The European history collection focuses on World War II, current conflicts and social conditions affected by historical movements.
- Literature: A broad collection that is international in scope, including an in-depth poetry collection that serves our local poetry community. The collection includes translations of plays, speeches, drama, essays and humor from all over the world and includes books from 1900 to current. One likely candidate for digitization would be the J. Francis McComas science fiction collection which contains more than 3,000 books and series dating from the 1920s to the 1970s.
- International language collections, especially strong in Chinese and Russian language materials.
- Books – many rare - from our James Hormel LGBTQIA collections: This resource collection is national and international in scope with a primary focus on Northern California. It pays particular attention to the experience of people of color, the disabled, youth, the elderly, and other groups which are often marginalized within this community. As we know from the requests that we receive, there is voracious interest in these collections in locations far and wide.

We are keenly excited about the potential of this project to make new strides in the inter-library loan conundrum, by creating instantaneous interlibrary loan access respectful of copyright. This would allow us to share our collections and participate in an ILL model that would be nothing short of revolutionary in its ability to meet the information needs of our communities and other communities. It also has the potential to realize enormous cost savings to libraries, savings that can go into building collections instead of slowly and laboriously moving physical materials. It will help libraries with their ongoing on-site space management needs, another way that that costs can be contained and services expanded at the same time.

As a major urban library with extensive research collections that serve both San Franciscans and many residents of surrounding counties, we look forward to collaborating closely with the leadership of the Internet Archive and its many partners who have also agreed to share collections, resources and expertise in this unique and exciting venture.

Sincerely,



Luis Herrera
City Librarian

June 28, 2017

MacArthur Foundation Board
Via E-mail

Dear Members of the MacArthur Foundation Board:

We are writing to support the Internet Archive's application to be considered for the MacArthur's 100&Change. Our organization, the Coalition for Networked Information (CNI), has had a close relationship with the Internet Archive since its inception, and we have given our highest award to Brewster Kahle, the IA's founder. CNI (see www.cni.org) is a non-profit program of the Association of Research Libraries and EDUCAUSE, a higher education information technology association, which promotes the transformative promise of networked information technology for the advancement of scholarly communication and the enrichment of intellectual productivity. Our members, which include most major US higher education institutions, libraries such as the Library of Congress and National Library of Medicine, publishers and scholarly societies, foundations such as the Andrew W. Mellon foundation, and technology service providers, have been at the forefront of developing, disseminating, and preserving digital content for the research and education community.

In its application for the MacArthur 100&Change competition, the Internet Archive highlights some of the significant roadblocks to broad access to published content in the digital environment, particularly copyright restrictions and accessibility. Many individuals assume that libraries can scan any book they please and make it available in digital form; they are unaware of the copyright restrictions that make that difficult if not impossible for most uses. However, there are exceptions to copyright for materials that will be used by the blind and handicapped, and this is where the Internet Archive, with its deep expertise in large-scale digitization, could make a great difference. Importantly, these digital books would be globally available under conditions that comply with US law, and the IA will also safeguard the privacy of its users. For the CNI community, we believe that this initiative would be very useful to print-disabled students who need access to a wide range of texts in their college or university program. Universities are under increasing pressure to provide accessible resources to their students, and this large-scale program by IA would do much to assist their efforts. The IA's goal to provide more equitable public access to knowledge is consistent with the goals of our own organization. An additional benefit of this project would be the large corpus of digital texts created, which IA could make available for scholars studying big data or using techniques such as text mining to study linguistic or historical trends. This project will have a long-lasting payoff for education around the globe. We strongly support the Internet Archive's application for this award.

Brewster Kahle and the Internet Archive have already changed the world for good by ensuring that our society has access to the history of the WorldWide Web. Many said this could not be done, and they have done it. With the MacArthur Foundation's support, they can seize the chance to change the world again, and to set right some shameful failures to take advantage of the opportunities of the digital age.

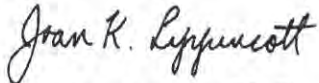
We of course would be delighted to provide any further information or clarifications

Sincerely,

A handwritten signature in black ink, appearing to read "Cliff A Lynch". The signature is fluid and cursive, with a long horizontal stroke at the end.

Clifford A Lynch, Ph.D.
Executive Director, Coalition for Networked Information

And

A handwritten signature in black ink, appearing to read "Joan K. Lippincott". The signature is cursive and elegant, with a prominent initial "J".

Joan Lippincott, Ph.D.
Associate Executive Director, Coalition for Networked Information



July 13, 2017

To the MacArthur Foundation Board Members:

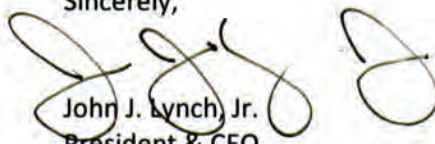
Houghton Mifflin Harcourt supports the Internet Archive's application for the MacArthur Foundation's 100&Change grant.

Houghton Mifflin Harcourt is a global learning company dedicated to changing people's lives by fostering passionate, curious learners. Since 1832 we have been bringing to bookshelves works by some of the world's greatest authors and most iconic literary characters, such as Nathaniel Hawthorne, Willa Cather, Virginia Woolf, Curious George, Mike Mulligan and his Steam Shovel, and Alice Walker. We have been serving the K-12 market with outstanding products since the founding of our education department in 1882; today, we service over 150 million students and 3 million educators globally.

Given HMH's long history, we are acutely aware that there are books and other historic materials that are no longer available for readers who may want to access them. Furthermore, there are readers today who do not even know that this important legacy of American literary history exists. We do not want this legacy to get lost and we are committed to preserving and making it accessible to all.

The Internet Archive's *Open Libraries* will make HMH's books accessible to *everyone*, regardless of a reader's location, physical ability, or economic status. We are eager to work with the Internet Archive to make our archive of published works available through *Open Libraries*. One of our legacy founding companies, The Riverside Press, was at the forefront of printing technology from its founding in 1852. We are thrilled to ally ourselves with a project that will make our 19th and 20th century history available through 21st century technology. This project aligns perfectly with our mission to improve educational outcomes in underserved communities, foster curiosity, and provide materials easily and at no cost to learners of all ages. We wholeheartedly support it.

Sincerely,



John J. Lynch, Jr.
President & CEO
Houghton Mifflin Harcourt



AUTHORS
ALLIANCE

authorsalliance.org
510.480.8302

2705 Webster St. #5805
Berkeley, CA 94705

June 30, 2017

Re: 100&Change Semi-Finalist Support - Internet Archive's Open Libraries

Dear MacArthur Foundation Board Members,

We write on behalf of Authors Alliance to express our support for the Internet Archive's Open Libraries proposal for the MacArthur Foundation's 100&Change grant. Authors Alliance is a nonprofit organization representing the interests of authors who want to take advantage of opportunities of the digital age to share their creations with readers, promote the ongoing progress of knowledge, and advance the public good. Our more than 1,200 members—including academics, novelists, nonfiction authors, and librarians—share the goal of making works of authorship broadly available in order to keep books in the hands of readers.

The Internet has made information and creative works available on an unprecedented scale, but its potential in this regard is still largely unrealized. Authors face a host of technical, legal, and financial barriers that prevent them from sharing their works that are out of print, un-digitized, and/or subject to copyrights signed away long before the digital age. Their books are effectively locked away, creating a gap in the public availability of important works. Keeping valuable knowledge and creativity out of the reach of readers benefits no one. For authors, the lack of an online version of their books can be tantamount to oblivion. For readers, it restricts the universe of available knowledge and culture.

We at Authors Alliance have firsthand knowledge of this problem. Many of our members want to give a second life to their books that have fallen out of print, but they signed over the copyrights in their works to publishers years ago. Fortunately, the educational materials we have developed on rights reversion have helped our members work with their publishers to regain rights to their out-of-print books and make them newly available in the ways that they want. Our partnership with the Internet Archive, and in particular its assistance with scanning reverted books, has allowed some of our members to make their works newly available to the public, for the first time in decades, on our Internet Archive collection page—and that's just a tiny fraction of what Open Libraries could accomplish at scale.

Our successful partnership is just one of many reasons why we wholeheartedly endorse the Internet Archive's vision for Open Libraries and its ambitious goal to digitize 4 million books and put them in the hands of readers. But reviving out-of-print works is not the only way authors hope that digitization will ensure that their works reach readers. For many readers around the world, digitized books are not merely a more convenient means to access works—they may be the only way to do so. Even if a book happens to be available in a local library, there are many readers who are nonetheless unable to access it due to infirmity or a print disability. Moreover, readers in the developing world are hungry for knowledge, but their access to it is often severely

limited. Online books may well be their only route to an education and its lifelong benefits. Many authors care deeply about making sure their works are available to these readers and worry that gaps in digital availability prevent these readers from accessing their books.

Digital libraries also create new opportunities for authors from under-represented communities to reach readers. Communities of color, the disabled, students, seniors, the incarcerated, LGBTQI people, and religious minorities are just some of the voices that have historically been at the margins of mainstream publishing. By working with partner organizations to proactively identify and include works that may be largely unavailable via traditional channels, Open Libraries will dramatically increase the diversity of knowledge available online and put it in the hands of readers and scholars who would otherwise have limited or no access to these works.

The Open Libraries project will not only make the pool of available knowledge and creativity broader and deeper, but it will also make it accessible to the print disabled, the elderly, and those in under-served communities around the world on an unprecedented scale. In doing so, we believe that the project is an ambitious vision honoring the spirit of 100&Change and also an undertaking that benefits authors—such as our members—whose goal is to share their works as widely as possible. We support the Internet Archive in this ambitious vision, and urge you to consider the Open Libraries proposal as a worthy recipient of the 100&Change award from the MacArthur Foundation.

Sincerely,



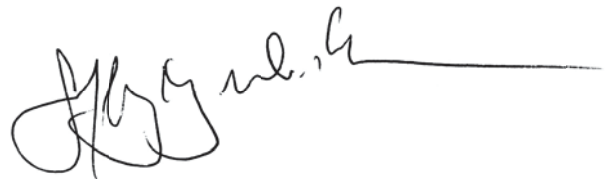
Brianna Schofield
Executive Director, Authors Alliance




Pamela Samuelson
President, Authors Alliance



Carla Hesse
Board of Directors, Authors Alliance



Jeffrey MacKie-Mason
Board of Directors, Authors Alliance



Thomas Leonard
Board of Directors, Authors Alliance



Molly Shaffer Van Houweling
Board of Directors, Authors Alliance

June 30, 2017

To: MacArthur Foundation Board Members

I'm Amy Brand, Director of the MIT Press. Known for digital innovation and excellence in content and design, the MIT Press advances knowledge by publishing significant works from leading thinkers around the globe for the broadest possible access, impact, and audience.

I'm extremely delighted to be partnering with the Internet Archive in its ambitious and important digitization efforts, and I fully endorse IA's application to the exciting 100&*Change* opportunity. We've already committed to digitize hundreds of backlist MIT Press books where we have the relevant rights, and to enable open access where legal and practical as well. At a minimum, the digitized books will be available for free one-at-a-time lending through openlibrary.org and through libraries that participate in the proposed OpenLibraries project, which is intended to enable libraries that own the physical books to lend digital copies to their patrons. This effort breathes new life into older books, benefitting authors as well as readers around the globe.

When I started as Director of the MIT Press a couple of years ago, one of my top ambitions was to make sure that everything we've published and have the rights to digitize be made accessible, searchable, discoverable, mineable, now and in perpetuity. When I connected with Brewster Kahle at the Internet Archive, we realized that partnering to achieve this made great sense for both parties. IA is looking to bring as many print-only books online as possible, and working directly with publishers is a key part of his strategy. For the MIT Press, the relationship means we also get back digital files for our own use. In addition to making older works newly available and significantly growing our open access program, I see this effort as a proactive alternative to widespread circulation of unauthorized digital files for these works.

In short, this is an incredibly important effort of vast proportions and world-changing potential, and I urge the Board to fund the Internet Archive's application.

Sincerely,



Amy Brand, PhD
Director, The MIT Press





July 10, 2017

To: MacArthur Foundation Board of Directors

Via The Internet Archive

Re: Internet Archive's OpenLibraries Initiative for 100&Change

Dear Board of the MacArthur Foundation,

The Internet Archive is a trusted partner of the Wikimedia Foundation in our shared objective of helping to make the global web, and vast collections of human knowledge, more reliable and accessible. The Wikimedia Foundation is the non-profit organization that supports and operates Wikipedia, Wikimedia Commons, Wikidata, and other free knowledge projects. The Wikimedia sites are viewed more than 15 billion times every month by people from every corner of the globe. All of our work is guided by our mission to enable every person on the planet to share in the sum of all knowledge. As such, we welcome and appreciate the opportunity to support the Internet Archive's OpenLibraries Initiative as part of the MacArthur Foundation's 100&Change competition.

At Wikimedia, we know that knowledge is constantly in flux. Our understanding of the world changes as new information becomes available, giving us new opportunities to build on what we once knew to be true. Services that the Internet Archive offer are critical to supporting this system -- tying us to published records and source material so that we may continue to learn, understand, and build for the future.

One issue that Wikimedia and the Internet Archive can solve together is the critical issue of "link rot". Link rot is what happens as material on the web disappears, and its associated links -- often critical citations -- are broken forever. For the past several years the Wikimedia Foundation, and volunteers from the Wikipedia community, have partnered with the Internet Archive to make near real-time backups of web-based resources which Wikipedia editors reference in their articles. This helps make Wikipedia more reliable and useful after web links used in Wikipedia articles have changed, moved, or otherwise become inaccessible in their original form. More than two million of those "broken links" on English Wikipedia have been repaired thanks to archived copies on the Wayback Machine.

The trust users have in the credibility of Wikipedia articles, built up by volunteers over more than 15 years, is key to its success -- and the reason why users read around 15 billion pages every month. A key element of trust is the requirement that information is backed up with published sources, referenced on Wikipedia. Even as information is digitized to the web, books remain a critical source of our shared knowledge - and a foundation for Wikipedia articles.

Imagine a world in which every single human being can freely share in the sum of all knowledge.



Substantial support from the MacArthur Foundation to help advance the Internet Archive's effort to accelerate and expand their book digitization, transformation, and dissemination efforts would be a gift not only to knowledge and open culture organizations, but to humanity at large. Hundreds of thousands of volunteer Wikipedia editors would be able to include citations from 4 million additional eBooks, with live links that take readers directly into the books themselves, grounding them in the published record. This project will weave a rich and reliable explanation of our world into Wikipedia and the web for generations to come.

We applaud what the Internet Archive has accomplished, we rely on and appreciate our ongoing work together, and we look forward to collaborating with them in the years ahead.

Good luck!

Sincerely,

A handwritten signature in black ink, appearing to read 'Katherine Maher', with a long, sweeping horizontal line extending to the right.

Katherine Maher

Executive Director, Wikimedia Foundation

Imagine a world in which every single human being can freely share in the sum of all knowledge.

wikimediafoundation.org · 149 New Montgomery St, 6th Floor, San Francisco CA 94105 · 1-415-839-6885 · 1-415-882-0495 fax

July 7, 2017

Board of Directors
John D. and Catherine T. MacArthur Foundation
140 S. Dearborn Street
Chicago, IL 60603

SUBJECT: Internet Archive Proposal for 100&Change

Dear MacArthur Foundation Board Members,

On behalf of the Public Library Association (PLA) Board of Directors, I am writing to express support of the Internet Archive's Open Libraries Project, and to share our intent to advise and disseminate information to the public library field about the project. PLA works in partnership with public libraries to enhance their abilities to provide an array of services to their communities. The proposed project is in strong alignment with our goals as it seeks to help librarians become digital leaders, sharing their collections both locally and well beyond traditional boundaries and at the same time, increasing their own community's access to even richer collections.

The Public Library Association exists to strengthen public libraries and their contribution to the communities they serve. PLA provides a diverse program of communication, publication, advocacy, continuing education, and programming for its 9,000+ members and others interested in the advancement of public library service. PLA is eager to team with Internet Archive on this project as the resources to be developed support the goals of our strategic plan, helping libraries transform and supporting literacy and the information needs of our communities.

Public libraries have vital roles to play in ensuring our communities have the access to information they need for success in the 21st century. PLA is delighted to collaborate with the Internet Archive on this important work. Please do not hesitate to contact me if you have any questions.

Sincerely,



Pam Sandlian Smith
PLA President 2017-2018
Director, Anythink Libraries
Thornton, Colorado

p (800) 545-2433 ext. 5PLA

f (312) 280-5029

www.pla.org

June 30, 2017

Board of Directors
John D. and Catherine T. MacArthur Foundation
140 S. Dearborn Street
Chicago, IL 60603

SUBJECT: Internet Archive Proposal for 100&Change

Dear MacArthur Foundation Board Members,

DPLA (Digital Public Library of America) is a strong supporter and partner with Internet Archive, as we share a common mission, providing free and open access to digital materials. In particular, we look forward to be a strategic curation partner with Internet Archive if their proposal for digitizing and providing access to four million books is funded.

We are acutely aware at DPLA there is a large inequities in the distribution and access of digitized books, and the project, as proposed by Internet Archive, can significantly reduce the gap and digital divide that exists between those that have access to published curated content and those that do not.

As a partner DPLA brings a rich network of 2,500 libraries, museums and archives that are passionate about expanding the breadth and depth of digitized materials to their patrons, and would welcome the opportunity to participate in a national initiative focused on expanding access to a broader audience of patrons.

We look forward in working with Internet Archive to enable access to an additional four million digital books, many unavailable anywhere in digital form, and partnering with libraries providing free open access to knowledge.

Sincerely,



Michele Kimpton
Acting Executive Director
DPLA



July 6, 2017

John D. and Catherine T. MacArthur Foundation
140 S. Dearborn Street
Chicago, IL 60603-5285
Attn: Board of Directors

RE: 100&Change – letter of support for Internet Archive

Dear MacArthur Foundation Board Members:

The **Califa Group** strongly supports the **Internet Archive's Open Libraries** project, a finalist in the **MacArthur Foundation 100 & Change** grant competition.

The **Califa Group** is a non-profit library consortium representing 230 libraries in California and is a recognized leader in e-content advocacy, access and innovation. All public libraries in California are Califa members, benefiting from the resource sharing, procurement, grant projects, continuing education and e-content services we provide. And all of these libraries and their 23 million California cardholders will benefit from digital access to 4 million books!

Specifically, the Internet Archive Open Libraries project is good for libraries and good for the public we serve because it will:

- provide individuals with access to materials that would otherwise be inaccessible because of local availability, cost to purchase, or vision impairment;
- provide libraries the ability to loan a digital OR a print version of a book without having to purchase a single title in multiple formats; making it possible for library budgets to purchase more new titles rather than digital copies of the same titles they already have;
- provide libraries the ability to offer more materials without the need for physical space to store them;



- provide the world with access to rare and out-of-print and local and international language materials where no digital version exists.

Throughout the history of the United States, and even long prior to 1776, American libraries have served as stewards of the public good, providing the public with access to a wealth of resources well beyond what any one person would otherwise be able to access, and preserving our cultural heritage by protecting the records of our history. Current digital licensing models threaten the expansion of knowledge for the public good and undermine the public's rights under the law to use copyright protected works. The Internet Archive's Open Libraries project aims to surge forward the ability for libraries to continue this important public service.

On behalf of the Califa Group, I encourage the MacArthur Foundation to fund the Internet Archive's proposal. We are eager to see this explosion of access to digitized materials which will benefit readers and learners and knowledge explorers everywhere. And forever.

Sincerely,

A handwritten signature in blue ink, reading "Paula MacKinnon".

Paula MacKinnon
Director, Califa Group



June 28, 2017

To: The MacArthur Foundation Board of Directors

Subject: The Internet Archive's Grant Application for 100&Change

Dear Directors,

I am writing to support the Internet Archive's application for the 100&Change Grant. Their Open Libraries initiative is a bold proposal that would increase access to and preservation of important information, solving problems with which libraries struggle in our efforts to share and maintain access to our intellectual heritage.

I write on behalf not only of my own library but also of ReadersFirst. We are an open and cost-free organization of some three hundred library systems representing 200 million readers across the globe. We are dedicated to ensuring access to free and easy-to-use eBook content. To learn more about us, please visit <http://www.readersfirst.org/>.

Open Libraries, if funded, would allow libraries to overcome many obstacles they face in sharing their collections digitally. The cost of digitizing, restrictions on the use of eBooks through licensing and other legal issues, and lack of interoperability of different library systems all stymie access to readers and threaten the very survival of millions of works published since 1923. By digitizing millions of works in a content exchange operating across many platforms, thus realizing the promise of technology to improve the eBook experience, the project will allow libraries to share content while respecting the rights of authors and publishers, mirroring borrowing of physical items. Content will be simple to get. Books that will otherwise be lost will remain in the human record. Readers will benefit from access to free, valid, and quality information, better able to explore, learn, and develop intellectually and emotionally. In a time when funding cuts threaten our ability to fulfil our vital mission and when access to information is becoming increasingly commercialized and unavailable to many who most need it, this project will assist libraries in extending their reach and fulfilling their vital mission as an essential and necessary element of the democratic experiment. Libraries will extend this initiative's reach to millions upon millions of readers. The project is meaningful, verifiable implementation, durable in impact, and eminently feasible. Please give it favorable consideration.

Sincerely,

Michael Blackwell
Director, St Mary's County Library; ReadersFirst Communication and Advocacy Project Leader
23250 Hollywood Rd
Leonardtown, MD 20650
614-707-3865
mblackwell@stmalib.org

ALA American Library Association

Office for Intellectual Freedom

June 9, 2017

MacArthur Foundation Board
140 S. Dearborn Street
Chicago, IL 60603

Dear MacArthur Foundation Board,

I am writing in support of the Internet Archive's proposal to the John D. and Catherine T. MacArthur Foundation. As a father, I know the vital importance of libraries in the promotion of literacy – a skill that has profound, positive and lifelong effects on childhood health, longevity, the likelihood of avoiding incarceration, educational attainment, and income. As a longtime public library director involved in the promotion of ebooks, I understand the urgency of bridging the digital divide, and getting to people the content not currently available to them. As the director of the American Library Association's Office for Intellectual Freedom, I have learned that shared, open, digital platforms may provide the best single strategy to get the emerging voices of literature – diverse authors now shut out of traditional distribution systems of content – to the eager and increasingly diverse communities libraries serve.

Over the years, the Internet Archive has demonstrated that it is not only capable of dreaming big, but also of delivering big. The Internet Archive's proposal addresses an almost existential problem: how can libraries remain players in an increasingly digital age? How can we connect emerging content to emerging library users? How can we leverage the extraordinary presence of almost 120,000 libraries in the United States to build literate and knowledgeable communities – the surest, and most cost-effective path to a self-sustaining society? The Internet Archive's very innovative approach, using existing technologies, and respecting author's rights, is among the most promising directions I have seen. It solves an important problem and holds great promise for all the people libraries serve.

The Office for Intellectual Freedom strongly endorses the Internet Archive's proposal, and wishes them good fortune.

Sincerely,



James LaRue, Director
Office for Intellectual Freedom &
Freedom to Read Foundation



Northeastern University

University Libraries

June 30, 2017

Board of Directors
John D. and Catherine T. MacArthur Foundation
140 S. Dearborn Street
Chicago, IL 60603

Re: Internet Archive Proposal, 100&Change

Dear MacArthur Foundation Board Members,

I am writing with my strong support for the Internet Archive's exciting and transformative proposal to the 100&Change grant program. As the current Dean of the Libraries at Northeastern University, and having led a national nonprofit to provide access to ebooks and other digital library materials, the Digital Public Library of America, I believe that I am in a very good position to evaluate the substantive impact of the Internet Archive's planned work and its important connections to libraries across the country and the world.

The Internet Archive is entirely correct that the state of access to ebooks in the United States and elsewhere is surprisingly and distressingly poor. As I learned at DPLA, among the nearly 17,000 branch libraries in the United States, most of them have the resources and capacity to provide access to only a very limited set of ebooks—often well under a thousand. Given the centrality of books in our culture, providing a much larger array of them to all libraries is of utmost importance. The Internet Archive's proposal maps out extraordinarily well a mechanism and process for all libraries to participate in a network that will support a vastly increased common collection—literally increasing that collection by several orders of magnitude for the average library.

Moreover, as the proposal highlights, there are populations that are especially disadvantaged in their access to ebooks. Those with vision disabilities are only one segment of a very large portion of the global public that currently has a set of hurdles to reading the full range of human expression held within the book collections of our libraries. The Internet Archive's proposed project would knock down these hurdles in relatively short order.

Moving from the public library world to the world of academic libraries that I now inhabit, I can see similar, quite major inequalities. Here at Northeastern, we have roughly a half-million book titles in our library, significantly more



Northeastern University

University Libraries

than the average public library but less than 1/30th the number at some of the other research libraries in the Boston area, such as Harvard's. And we are a relatively well-resourced university compared to thousands of others nationally and internationally. Being able to join our collection digitally with millions of other volumes from other libraries is an extremely exciting prospect, one that we would relish pursuing.

It is clear from the Internet Archive's long track record of providing digital access that they can bring this project to fruition. The project plan is hugely ambitious but also quite doable with the combination of their infrastructure, staff, and the many partners who have lined up in support of this proposal. I hope that they are successful and that the great riches locked up in millions of books can be made available to all.

University Libraries

320 Snell Library
360 Huntington Avenue
Boston, MA 02115

617.373.5001
f 617.373.5409

Sincerely,

A handwritten signature in black ink, appearing to read "Dan Cohen".

Dan Cohen
Vice Provost for Information Collaboration
Dean, University Libraries
Professor of History
Northeastern University

d.cohen@northeastern.edu

June 22, 2017

Board of Directors
John D. and Catherine T. MacArthur Foundation
140 S. Dearborn Street
Chicago, IL 60603

Re: Internet Archive Proposal for 100&Change

Dear Board Members,

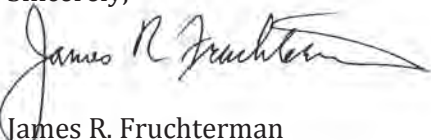
I am writing to provide my enthusiastic support for the Internet Archive's 100&Change proposal, both as an individual leader in the field and in my capacity as CEO of Benetech and founder of Benetech's largest program, the Bookshare online library for people with disabilities such as blindness or dyslexia. I am personally serving as an advisor to the Open Libraries Project, and Benetech has committed to extensively support the Internet Archive in this project once funded.

The Internet Archive and Benetech share a vision of ensuring that the reinvention of the traditional library fully includes persons with disabilities. The digital book is intrinsically far more usable for readers with disabilities than the traditional printed book, and can reach far more of this community. The combined efforts of the largest digital library for the general public, Internet Archive's Open Library, and Benetech's largest digital library for people with disabilities, Bookshare, will make it possible for many millions of readers to have far greater access to the written word, both in the United States and around the globe. Digital libraries also offer terrific leverage in cost-effectiveness, making it practical to serve millions of people with modest resources compared to traditional print-book libraries.

Both Internet Archive and Benetech are trailblazers in using the public interest aspects of copyright law to maximize access to books for neglected communities. Our joint effort intends to expand that access by fully using the fair use exception and the 1:1 lending model inside the United States to help the Open Library deliver accessible books to American readers with a full range of disabilities (15-20% of all Americans), including the majority who do not meet the narrower disability copyright exception (less than 5% of Americans). At the same time, we'll use the newly in-force Marrakesh Treaty, which replicates the American disability copyright exception, to expand access to the combined collections of our two libraries.

This last point is the most ambitious objective of this partnership from Benetech's standpoint. We want to ensure that everybody in the world with a qualifying disability will have access to both the Open Library and Bookshare collections for free, expanding access to books for education, employment and social inclusion. In short, creating a global free library for people with disabilities!

Sincerely,



James R. Fruchterman
CEO and Founder, Benetech



Dated: 6/7/2017

Dear Members of the MacArthur Foundation Board,

We write to express our support to the Internet Archive for its proposal to make millions of books available in accessible digital formats for persons with print disabilities around the world.

The Centre for Internet and Society (CIS) is a non-profit organisation that undertakes interdisciplinary research on internet and digital technologies from policy and academic perspectives. The areas of focus include digital accessibility for persons with disabilities, access to knowledge, intellectual property rights, openness (including open data, free and open source software, open standards, open access, open educational resources, and open video), internet governance, telecommunication reform, digital privacy, and cyber-security.

The Accessibility and Inclusion Programme is an integral part of CIS, which envisions a world where all people, including those with disabilities can lead a life of full inclusion, participation, independence and dignity and are enabled to access the Internet using information and communications technologies on an equal basis without discrimination or barriers.

One of the true joys of life is that derived from reading books. It is always a cherished memory of childhood, a building block of one's growing years and a fundamental part of adult life. Unfortunately millions of persons with print disabilities around the world, more especially in developing countries around the APAC and other regions have severely limited access to books. The project proposed by Internet Archive to digitise millions of books in accessible formats is immensely important and timely for us. CIS has always been working towards the cause of opening up books for the print disabled in India, starting with our work to amend the Indian Copyright Act to include an exception on fair dealing for persons with disabilities, nearly a decade ago, conducting right to read campaigns around India, participating actively in the WIPO negotiations on the Marrakesh Treaty to which India was the first ratifying country, to our other work to digitise Educational content in regional languages in Daisy and creating text to speech engines for 10 Indian languages, we have tried to address the problem of non-availability of accessible content in different ways. The last year also witnessed the opening of the accessible digital library of India. Hence we were very excited to learn of this project and the opportunity to be an integral part of it. We hope to support through facilitating addition of regional language books in India and content that will benefit neighbouring countries sharing similar languages, building useful ties and networks to expand the work, provide technical and strategic advice and in any other way which is required of us to make this project successful and make available millions of books in the hands of Indians with print disabilities.

This project will positively impact the lives of millions of people in a wonderful way. We request MF to consider this with favour.

Yours sincerely

Sunil Abraham



July 3, 2017

Re: 100&Change - letter of support for Internet Archive

Dear MacArthur Foundation Board Members:

Since 1948, Learning Ally has represented the critical difference between isolation and integration, between frustration and pride, and between struggle and success in the classroom and workplace for millions. Our history can be traced to the top floor of the New York Public Library in 1948, when we were founded as Recording for the Blind (RFB) to fulfill the need for recorded textbooks for soldiers blinded in WWII. Their sudden loss of vision and access to print precluded these capable and motivated young people from completing their educations and accessing knowledge.

Today, Learning Ally continues its heritage of enabling life-changing impact as we focus on the estimated 6 out of 10 students who read below grade level. For many of these young people, their print-based learning disabilities are the root cause of their reading struggles. Without reading, these students are inhibited from instruction, suffer academically, and develop negative attitudes to their abilities and self-worth.

Our solution provides K-12 public school educators with resources to help them better understand how their students learn and our audiobooks enable students to read and demonstrate their academic potential. As a result, they are able to better engage in classroom instruction, take ownership of their learning, and avoid social penalties around dropout, unemployment, and incarceration which research suggests are more likely to occur among students with learning disabilities.

The Internet Archive will expand the ability of libraries to deliver on their role as great equalizers, providing access to books and other resources to those who might not otherwise be able to access them. A new generation of learners will have public access to knowledge as the project curate, digitizes, and make available in digital form four million books to any library that owns the physical book.

As Internet Archive makes these formats digital, new opportunities are created to deliver these into today's classrooms and enable libraries to add their strengths in addressing the needs of struggling readers. Learning Ally is proud to partner with Internet Archive to find ways in making this knowledge both available but also integrated in the instruction of thousands of classrooms that we serve daily.

Our vision is for all people to have equal opportunities to learn. Our organizations share this vision. We are proud to endorse the Internet Archive as they work to unlock a century of knowledge from print and make libraries worldwide both accessible and equitable.

Sincerely,



Andrew Friedman
President and CEO
Learning Ally

:LIGHTHOUSE:

FOR THE BLIND AND VISUALLY IMPAIRED

June 23, 2017

Dear MacArthur Foundation Board Members:

The LightHouse for the Blind and Visually Impaired is extremely excited by the opportunity to collaborate with the Internet Archive on this innovative proposal for improving access to information for people with visual disabilities. The proposed project to bring 4 million books online and ensure they are available to the print disabled around the world would make a major difference to many blind and visually-impaired people in their ability to access the world's knowledge. Access to information helps provide personal independence, is necessary to succeed in education and employment and essential to participating in society.

Headquartered in San Francisco, California, the LightHouse strives to promote social equality and independence, providing education, training, advocacy, and community for blind individuals in California and around the world. It is the position of the LightHouse that everyone with a visual, physical or learning disability has a right to equal access to all forms of information available to the general public and one of our goals is to provide access to the printed word for individuals who are unable to read conventional print.

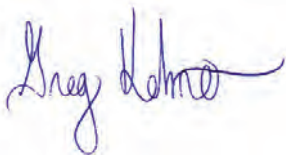
Expert in such things as web accessibility and adaptive technology, the LightHouse, through thorough consideration of access to information, can ensure the Internet Archive enhances the experience for blind and visually impaired visitors and does not inadvertently create access barriers for the 285 million people worldwide who are visually impaired.

Greg Kehret will serve as the LightHouse's primary contact for this project, and will coordinate with the Internet Archive and other project partners as needed. His responsibilities will include, but not be limited to:

- Coordination of usability studies and consumer feedback
- Consultation with Internet Archive on the archive.org visitor experience workflow;
- Assist and advise Internet Archive staff and other project partners as needed throughout the project period.

We look forward to beginning this exciting project.

Sincerely,



Greg Kehret

Director, Media and Accessible Design Lab

lighthouse-sf.org | Voice: 415.431.1481 | Fax: 415.863.7568 | VP: 415. 255. 5906



One Tower Lane, Suite 1825, Oakbrook Terrace, IL – 60181
E-mail : sam@sampitroda.com Phone : +1.630.965.1253

July 7, 2017

To,
The Board of Directors
MacArthur Foundation

Re: Internet Archive's OpenLibraries Initiative for *100&Change*

Dear MacArthur Foundation Board Members,

I am writing to provide my support for the Internet Archive's proposal for the MacArthur Foundation's 100&Change grant.

I have dedicated my life to broadening access to information and bridging digital divide in developing countries. In the mid-1980s, I worked in India to establish the Center for Development of Telematics, commonly (C-DOT), to build human capacity and build Indian telecom & software industry. Then India had 2 million phones and now India is a country of connected billion with 1.2 billion phones. At the same time, India also generates over \$140 billion in export for software & related services. The vision was to focus on digital telecom to bring about openness, accessibility, connectivity, networking, democratization and decentralization and as a result social transformation.

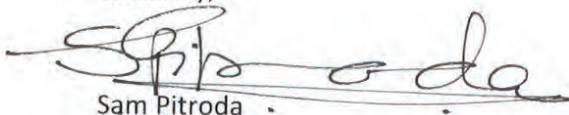
Recently I participated in announcing the Internet Archive's hosting of 500,000 digitized books from the Digital Library of India. The Internet Archive is a great partner for India in this. This project can take this another step.

To ensure that access to knowledge is available in India, I'm happy to endorse the Internet Archive as they work to bring four million books online and provide access to materials to those who might not otherwise be able to access them — specifically those with disabilities.

India is home to fifteen million blind people, one of the largest blind populations in the world, so it is crucial that we make information available to these people with print disabilities. Most of these are young with great hope and aspirations. They are also technology friendly and will benefit from digital library. We support Internet Archive's eBook dissemination plan for the print disabled beginning with India and other countries.

I support a wider distribution of digital texts across the world specially in developing countries with focus on inclusion, education, health & environment. Let's bring down the barriers and democratize information to educate and enhance quality of life for the people at the bottom of the economic pyramid in rural areas and in disabled communities.

Sincerely,



Sam Pitroda



Whose Knowledge?

The Board of Directors,
The MacArthur Foundation.

28 June 2017

Letter of Support for Internet Archive's Open Libraries proposal for the 100&Change Competition

Dear Board of Directors of the MacArthur Foundation,

As the founders of *Whose Knowledge?* — a global, multi-lingual campaign to make knowledge on the internet more diverse and plural — we strongly support the goals of the Internet Archive's Open Libraries initiative, a project that seeks to bring millions of books to billions of marginalised people around the globe. Our mission is in great alignment with the Internet Archive's. We seek to infuse the internet with the histories and knowledges of marginalised communities who make up the majority of the world's population, particularly: women, people of colour, LGBTQI communities, indigenous peoples, and others from the global South. The Open Libraries project will not only give more diverse people access to knowledge, but it seeks to also bring a more diverse and inclusive mix of voices online through the books it digitises.

We founded the *Whose Knowledge?* campaign in 2016 after working at the intersections of social justice, human rights and technology movements for a collective 30 years. Before starting *Whose Knowledge?*, we were both at the Wikimedia Foundation, the non-profit that operates Wikipedia and its sister sites: [Anasuya](#) as Chief Grantmaking/Community Engagement Officer and [Siko](#) as Director of Community Resources.

We write to you today as proud partners of the Internet Archive, the pre-eminent online library for the world, particularly in its proposal to bring 4 million diverse and inclusive digitised books to those with accessibility and access issues. Anasuya is also honoured to be an [advisor](#) for this critical and ambitious vision of Open Libraries. We are helping the team reach beyond the United States and connect directly with populations they seek to serve, including in India.

As feminists from the global South and North and spaces between, we have constantly challenged the structural biases that exist against multiple and intersectional identities, including of gender, sexuality, race, class, geography, language and ability. However, through working in the free and open knowledge movement, we have learnt how significant these biases are when transmitted online, and what they imply.

If we use Wikipedia as a proxy indicator of online public knowledge, only [20% of the world](#) (primarily white male editors from North America and Europe) edits 80% of Wikipedia currently, and only [1 in 10 of the editors](#) is estimated to self-identify as female. Anecdotally, we know very few Wikipedia editors who are visually disabled. And yet, only a fourth of the [world's online population](#)

Whose Knowledge?

<http://whoseknowledge.org/>

117 Wilkes Circle, Santa Cruz, CA 95060

We are an unincorporated nonprofit association with 501(c)3 fiscal sponsorship from Peace Development Fund.

1



Whose Knowledge?

comes from North America and Europe, and the 285 million people who are [visually disabled globally](#), are nearly the population of the United States.

Why does the majority of the world not have voice and visibility on Wikipedia and the broader internet? One critical reason is that most of the world does not have easy access to knowledge - to the *sources* that are published books, journals and other materials - that constitute the foundation of Wikipedia and other forms of public knowledge. The majority of the world's libraries and their collections are in the global North, in places and spaces that privilege a minority of the world.

Why does this matter? When a young Dalit woman from Daulatabad with no easy access to libraries cannot read her own community's scholarship, she cannot fight back the oppression of centuries of being considered "untouchable," and having her history and knowledge denied. When a Native American scholar from a reservation in Southern California does not have easy access to the history of the Gold Rush as described by his own peoples, he cannot easily establish that the Gold Rush may have been "progress" for the white settlers, but it was genocide for the Native Americans. Without access to the cultures, histories and knowledges that are embodied in books, it is difficult to create reliable public knowledge, on sites such as Wikipedia. And as the internet becomes the default library of the world, and Wikipedia its default encyclopaedia, the reality is that if you're not online, you're not in Wikipedia, you don't exist.

For us, the free and open knowledge movement brings together some of the most critical human rights and social justice issues of our time. The historical oppressions of colonisation and imperialism, of sexism and racism, of power and privilege, have found a new space in which to entrench themselves: the internet. At the same time, the internet offers an unparalleled opportunity to deconstruct these oppressions and reconstruct freedom and dignity for all peoples. And it is only through efforts like that of the Internet Archive that we can begin to offer marginalised communities around the world access to different forms of knowledge, and in turn, celebrate and learn from the uncovering of their own rich and diverse knowledges.

As partners of the Internet Archive, we are committed to working with our global networks across the Wikimedia, feminist, indigenous, disability and human rights movements, to ensure that the 4 million books that are digitised reflect the needs and aspirations of these communities. We will work towards ensuring that the young Dalit woman can read her own community's scholarship online and feel empowered, and that the Native American scholar can use it to change the historical perspective on the Gold Rush. Free and open knowledge is not just free as in beer, it is truly free as in *libre*.

Anasuya Sengupta and Siko Bouterse
Co-founders and Coordinators, *Whose Knowledge?*

Whose Knowledge?

<http://whoseknowledge.org/>

117 Wilkes Circle, Santa Cruz, CA 95060

We are an unincorporated nonprofit association with 501(c)3 fiscal sponsorship from Peace Development Fund.

2



College Promise Campaign

727 15th Street., NW, Suite 300,
Washington, DC, 20005

martha@civiction.org
408-497-5939
collegepromise.org

Dear MacArthur Foundation Board Members,

I am writing on behalf of the College Promise Campaign and Civic Nation, to extend our wholehearted support of the Internet Archive (IA)'s submission to [MacArthur's100&Change competition](#). I also write from my perspective in my former capacities as President Obama's U.S. Under Secretary of Education (2009-2013), NYU professor, and a decades-long community college faculty member, president and chancellor.

The College Promise Campaign is a major initiative of Civic Nation, a nonprofit, nonpartisan corporation in Washington, D.C. that works with public and private U.S. partners to create and leverage tools and campaigns to build public awareness, organize and engage local communities, states and our nation to address America's most pressing problems in education, equity, violence, and citizenship. Home to seven national initiatives, Civic Nation houses the College Promise Campaign (CPC) dedicated to helping communities and states build the "*free college movement*" to make the first two years, at a minimum, universal and freely available to youth and adults seeking an education beyond high school.

Announced by President Obama in September 2015, the CPC has worked to triple the now more than 200 local communities and 8 states supporting College Promise programs. The CPC is focused on identifying and promoting evidence-based research, policy, communications, advocacy and leadership development to support cross-sector leaders from business, philanthropy, education and government committed to working together to make and keep some or all of a college education affordable for our nation's students, starting in but not limited to our nation's community colleges. IA's proposal would enable our nation's 7,000+ colleges and universities, and the 25 million undergraduate and graduate students to utilize the anticipated collection of 4 million digitized open books from diverse audiences and locations to serve youth and adults here and across the world. Of these institutions of higher education, half of U.S. students attend one of the 1200 community colleges in every state. The majority of college students who are low-income, first generation, disabled, and/or from minority communities attend an American community college. Further, a select number of leading community colleges are now making open, freely available textbooks available for entire departments, majors and disciplines to eliminate rising textbook costs that increase college costs and fall harshly on low-income students to cover. These institutions and community college students would reap enormous academic and financial benefits from their enabled access to a wealth of public domain books and materials generated from IA's proposal.

On a personal note, having worked with my Foothill-De Anza Community College District governing board in 2000 to pass the first Open Educational Resources policy for community colleges, I can think of no better investment in the world's future that the MacArthur Foundation can make than to enable 4 million more PD books to be put into our nation's classrooms and libraries. In doing so, the College



College Promise Campaign

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Washington, DC, 20005

martha@civcnation.org
408-497-5939
collegepromise.org

Promise Campaign would build on the work now underway to reduce or eliminate textbook costs in college courses across the country. Publishing companies are scrambling to identify alternate revenue streams to recover lost profits as the OER movement expands. This 20-year OER challenge would receive an enormous boost if the MacArthur Board were to select IA's ambitious proposal. Annually, millions of undergraduate and graduate students would benefit from this dramatic investment, replacing costly college textbooks with OER, on average saving students an estimated \$1000 or more per year. If funded, IA would make PD resources available for use by more than 4 million U.S. professors and academic staff. Beyond the U.S., professors, K-12 teachers from around the world would avail themselves of these unparalleled PD resources. Further, prior major U.S. investments, including the Arab Open Book project, could leverage the IA repository and resources to advance new methods and connected networks for preserving and disseminating at-risk knowledge compilations and repositories as well as open repositories that exist today via OER Commons and other open collections at major universities.

IA is uniquely suited to take on this challenge. It has already built the largest, most diverse open collection of books and citations in the world. Its leaders and staff have the composite knowledge and expertise to engage the widest possible communities and, in turn, their leaders to ensure the proposal's success. And IA is unafraid to take risks and build the trusted networks beyond those it has already secured to advance momentum, engagement and deliverables outlined in its proposal.

Today, our nation and the world are at risk. We face an enormous national and international leadership predicament wrought by violence and discrimination challenging every civil and human right on earth. This conundrum exacerbated by the largely undereducated haves and have-nots will only subside in the long-term by growing a more highly educated population – people in local communities who gain knowledge and expertise to increase their social and economic mobility while garnering a deeper appreciation of differences, diversities, and communities. Access to knowledge that the IA would make available will provide a long-term, invaluable resource in curbing marginalization, fear, and ignorance across our world. I hope you will select IA's proposal to win [MacArthur's100&Change competition](#).

Best regards,

Martha Kanter, Ed.D., Executive Director
College Promise Campaign @Civic Nation
U.S. Under Secretary of Education (2009-2013)
Senior Fellow, New York University



About ISKME

The Institute for the Study of Knowledge Management in Education (iskme.org) is a pioneer in knowledge sharing and educational innovation.

ISKME is best-known for its award-winning OER Commons initiative as well as its international research agenda on information and knowledge use in the education sector.

An independent, education nonprofit established in 2002, ISKME's research and development efforts enable schools, colleges, universities, and the organizations that support them to expand their capacity to collect and share information, and create knowledge-driven environments focused on learning and success.

June 13, 2017

Internet Archive's Library of 2020 *Providing Libraries & Learners with Free Digital Access to 4 Million Books*

Dear MacArthur Foundation Board Members:

The Institute for the Study of Knowledge Management in Education (ISKME) is pleased to offer its committed support for the Internet Archive Library of 2020 project proposal for the *100&Change* competition. The project has the potential to uniquely transform access to books and knowledge globally, to impact millions of readers with print disabilities, and to advance a culture around the continuous improvement of teaching and learning generally. The project is well-aligned to ISKME's mission, and to our substantial body of research on accessing, using, co-creating, and sharing knowledge and digital resources, and the impact of those behaviors on teaching and learning.

ISKME is an independent education nonprofit whose mission is to improve the practice of continuous learning, collaboration, and change in the education sector. Founded in 2002, ISKME is well known for its pioneering open education initiatives and thought leadership. Launched in 2007, ISKME's [OER Commons](#) is a public digital library and collaboration platform built to ensure the adoption and continuous improvement of open educational resources (OER).

Defined as no-cost, openly licensed, and freely adaptable curricula, OER is seen as a legal, economic, technical, and pedagogical solution to the demand for access to high-quality teaching and learning materials. A survey of more than 22,000 higher education students in Florida – spanning all 11 state universities and 22 of its 28 colleges, community colleges and state colleges – found [that 64 percent of students reported having not purchased a required textbook](#) because of its high cost.

To meet an urgent need for equitable access to quality content for all, ISKME has been working with K-12 and higher education partners since 2004 to identify effective OER adoption and engagement strategies, formulate OER policy agendas for stakeholders at all levels, as well as to increase access to and improvement of the growing body of OER. ISKME works directly with teachers, administrators, librarians, technology specialists, learners, and others to better integrate OER across digital learning platforms and to support the effective use of digital resources by all.

As a committed partner of the proposed project, ISKME strongly supports the Internet Archive's vision to enable millions with print disabilities, and, educators and learners everywhere, to access and make the best use of the digitized content. As a project adviser around the interoperability of and engagement with the digitized book content, and through integrated use of the OER Commons platform with the Internet Archive, ISKME sees the project as advancing an unprecedented opportunity to advance open and freely available curriculum around digitized book content, as a primary outcome of this supported access.

The project offers an innovative and viable plan for libraries to expand their abilities to impact lives, and for readers and learners everywhere to take advantage of important books as digital technologies and support systems continue to evolve into the future.

Sincerely,

Lisa Petrides, Ph.D.
ISKME CEO and Founder

July 4, 2017

5-07 Cameron Library
Edmonton, Alberta, Canada T6G 2J8
Tel: 780.492.5170
Fax: 780.492.7925
www.ls.ualberta.ca

Dear MacArthur Foundation Board Members,

The University of Alberta, with a student population of over 37,000, is a public university regularly named among the top five research-intensive universities in Canada, dedicated to the promise made by Founding President Henry Marshall Tory that "knowledge shall not be the concern of scholars alone. The uplifting of the whole people shall be its final goal."

As Vice-Provost and Chief Librarian, I have overall responsibility for the University of Alberta's library, the second-largest academic library in Canada, as well as the university's bookstores, Museums and Collections Services, Technology Training Centre and Copyright Office. I am proud to be writing this letter of support for our partner, the Internet Archive.

Over the last hundred years or so, the University of Alberta Libraries has collected more than seven million library items in all languages from all over the world. We are currently constructing a building to preserve and make accessible these physical collections on our South Campus. It will be completed this September.

Like other libraries, we have also been steadily digitizing materials with the assistance of the Internet Archive. After nearly a decade, we are up to about 90,000 items. More importantly, we now have total confidence in our partner that it is uniquely positioned to deliver high quality digitized materials through an openly accessible platform to all readers – including those with visual impairments - while respecting the library's stringent copyright and privacy requirements. By enabling the University of Alberta to return digitized versions of its books to the world, MacArthur Foundation support for the Internet Archive will help us realize a critical component of the promise President Tory made over a century ago.

During the next five years, we will grow our contribution to IA's goal by routing 500,000 additional items through the IA's super scanning center. We would not be able to achieve this without our partner. We are so proud to be part of a project that will provide public access to the authentic foundations for knowledge creation in this way.

Thank you for giving me an opportunity to provide this enthusiastic letter of support for the Internet Archive's "100&Change" proposal.

Sincerely,



Gerald Beasley
Vice-Provost & Chief Librarian

cc Geoff Harder, AUL Digital Initiatives

John D. & Catherine T. MacArthur Foundation
140 s. Dearborn St.
Chicago, IL 60603

July 10, 2017

Attn: Board of Directors

Re: Internet Archive Proposal for 100&Change

Dear MacArthur Foundation Board Members:

I am writing to confirm New Knowledge Organization Ltd.'s commitment to the Internet Archive's Open Libraries Project, and to convey our intent to serve as independent external evaluators to monitor the evolving nature of the initiative, provide the team with timely information on the context in which it is working, and to identify paths for them to achieve maximum impact with the MacArthur Foundation's investment.

New Knowledge Organization Ltd. (NewKnowledge) is an interdisciplinary charitable 501(c)(3) social science think tank collaborating with change-makers to build a strong, healthy democracy and thriving biosphere. We are committed to helping organizations increase access to and promote effective use of information to build stronger social capacity. Core to our mission is providing critical thinking and empirical data to build our partners' effectiveness and efficiency. We are committed to principles of pluralism and believe that everyone benefits from effective partnerships. We look forward to a close working relationship with the UW's Information School to understand the lived experience of users and the cultural groups who rely on their libraries as a critical path to knowledge development.

We feel this project is aligned to our expertise as researchers who are deeply engaged with social change initiatives. With support from the Bill & Melinda Gates Foundation and the Institute of Museum and Library Services, we have helped develop national impact measurement programs to fully assess how libraries are serving more important social functions than ever before. For US residents living at the lower end of the socio-economic strata, and those challenged to overcome physical barriers, the digital divide has abandoned them to minimal to no service from the commercial enterprises that dominate the Web. Low-income status and lack of learning resource accessibility has made libraries the sole lifeline to knowledge work and personal advancement for many members of our society. Our own reanalysis of data developed by UW's TASCHA found a nearly 1:1 correlation between those using libraries to develop new small businesses and the total number of entrepreneurs building the United States' new economy on which GDP growth depends. Despite political statements that seem to imply that everything is online and free, the Open Libraries project offers the first opportunity to help the digital universe live up to the promise and fulfill the needs of those people left behind in the rapid commercialization, monetizing, and paywall protections that perpetuate the cycle of poverty in our country.

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13 East 37th St., 7th FL
New York, NY 10016

tel: (442) 222-8814
3630 Ocean Ranch Blvd.
Oceanside, CA 92056

New Knowledge Organization Ltd.
Facing Society's Grand Challenges Head On

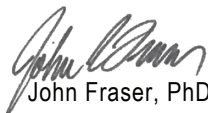
The collaboration with Internet Archive affords unique opportunities to leverage our work with cultural institutions and human rights education. The large-scale effort and strategic partnerships are structured to ensure we can collaborate with a growing community of communities who seek to see their cultures represented in their public libraries and academic collections. As the US becomes a majority minority country, too often the dominant cultural narrative present in library collections and now more tellingly in digital collections, has been the story of an oversimplified western paradigm. To meet this need, our team of human rights workers have developed strategies for helping communities raise their voices and share their priorities as central to any success measure. By applying these strategies to the Open Libraries Project, we are confident we can help ensure the collections acquisition priorities are articulated, vetted within service communities, and that value is placed on diversity of content with utility to all people, including underserved communities. Our overall evaluation goal is to use best practices in social science to ensure the Open Libraries project advances good for those left behind in the digital revolution.

We were pleased to collaborate with the Internet Archive team, our colleagues at the UW Information School, and the Digital Library Foundation to create a culturally responsive monitoring and evaluation plan that is now embedded in this submission to the 100&Change initiative. We believe this plan is culturally responsive and has the flexibility to adapt to change as the program grows.

As outlined in the submission, NewKnowledge is committed to implementing the work through a series of specific activities that build understanding of the evolving nature of impact and to stress-test assumptions or project strategies. We will: (1) Oversee the integrated overall evaluation program and provide reporting to the field and back to Internet Archive to ensure data is representative of the lived experience of users; (2) Lead community responsive evaluation and benchmarking to ensure all voices are providing input to the program; (3) Coordinate the project leadership and M&E team on development of annual evaluation priorities and undertake or commission expert evaluation to assess these issues; (4) Coordinate risk assessment and monitoring of the changing contexts that shape the cultural engagement with digital content; and (5) Assess legacy plans and anticipated impacts at the conclusion of the funded effort.

We look forward to supporting this initiative as it finally helps the Information Age evolve to a place where digital assets serve all people. Thank you for opportunity to help you build and realize this vision.

Sincerely,



John Fraser, PhD AIA
President & CEO



UNIVERSITY OF WASHINGTON

THE INFORMATION SCHOOL

July 5, 2017

Board of Directors
John D. and Catherine T. MacArthur Foundation
140 S. Dearborn Street
Chicago IL 60603

SUBJECT: Internet Archive Proposal for 100&Change

Dear MacArthur Foundation Board Members:

I am writing to express the University of Washington Information School's commitment to the Internet Archive's Open Libraries Project, and to convey our intent to support, advise, and fully participate in this initiative.

The Information School believes that access to and effective use of information is key to making a better world. Core to our mission is researching the problems and opportunities of information and designing solutions to information challenges. As a partner in supporting the Internet Archive's efforts, we can play a role in answering important questions that arise at the outset and throughout the implementation of the proposed program, developing and testing information solutions to meet specific needs and opportunities, and leveraging our standing in the library community to support the transformation of libraries worldwide. We believe that the Information School is strategically positioned to address questions surrounding the future of libraries through collaboration with our peers in the academy and the profession, and to direct and influence the practice of librarianship and the role that libraries must play in the lives of people and communities in the 21st century. The Information School's participation in this project will provide benefits through applying our strengths as a multi-disciplinary, research focused institution that addresses important questions about how information can improve lives.

In addition to the general support of the Information School, this project will draw upon specialized expertise that resides in two research groups within the School. The Technology & Social Change Group (TASCHA) is a globally recognized center for the study of information and communication technologies, public libraries, and international development. TASCHA, along with the International Federation of Library Associations and Institutions (IFLA), and the United States Public Library Association (PLA), have received major, long-term support from the Bill & Melinda Gates Foundation to accelerate the transformation of public libraries as critical centers of learning, creativity, and community development. TASCHA's role is to drive research and innovation, engaging thought leaders from within and outside the library sector to incubate new ideas and solutions in partnership with organizations at the forefront of fostering societal change. The Open Libraries work will build upon TASCHA's track record of research around the impact of technologies in more than 50 countries over 10 years, including research on public libraries as venues for access to information.

The DataLab is a research community at the Information School focused on developing and applying data science methods to projects that involve data, people and decisions. The DataLab has received numerous awards from the National Science Foundation, Sloan Foundation, Knight Foundation, Microsoft Research, Intel Research, and USAID, among many others. The Lab consists of six core faculty, 12 PhD students, and

2 postdocs with specialties in data curation, information visualization, computational social science, database engineering, scientometrics and machine learning. The Internet Archive collaboration is a sweet spot for the Lab's skillset and research interests. It involves a large-scale, heterogeneous dataset within the library community that requires more than just skills in designing APIs, computational infrastructure, visual analytics platforms and statistical inference but also careful consideration of ethical practices in delivering these data and results to the broader community. Our overall research goal is to leverage data for the social good, in an ethical manner that can inform policy and impact lives for the better. The Internet Archive project helps the Lab meet these goals and the faculty are excited to engage with the work proposed.

We believe that the Internet Archive's proposed project is a unique one that addresses the immediate challenge of expanding access to the world's knowledge through a digitize-and-lend model while collaborating with the research and practice communities to develop a sustainable model that will result in a systemic shift in how information is provided at scale. The careful attention to existing practices within the publishing and distribution industry will provide a solid substrate to build upon, and engage key partners in a way that meets their diverse needs, while reaching a wide audience that currently does not have access to digital materials.

We will work to implement this vision through a set of three inter-related activities centered on the aggregation of project-generated data along with data already available from others to provide a resource designed to answer questions related to key challenges around access to and use of digital knowledge. This project offers a unique, large-scale opportunity to provide access to this data through a systematic approach that the research and practice communities can use to investigate and improve the delivery and use of digital knowledge.

The first activity will involve working in partnership with Internet Archive and others to create the Impact Data Trust, a transparent, public repository for the impact data generated from the project. This work stream will focus on designing a conceptual model of the policies and processes necessary to foster successful access to and use of the data for researchers, library practitioners, and the IA. This repository and access model will serve as the basis for the second activity, which focuses on developing analytic tools to query and use the aggregated data to answer basic research questions and more advanced inquiries regarding the impact of the project, as well as providing support for the ongoing project evaluation. The third activity will ensure that the repository becomes a resource for the broader community; we will undertake a variety of activities designed to mobilize the research and practice communities to use the repository to analyze and share their data-driven insights with each other and the broader community. All of these activities will focus on understanding and answering questions related to the impact of expanded access to the resources provided through the IA project.

The Information School looks forward to bringing its expertise and resources to this multi-partner collaboration to bring the unique vision of the Internet Archive to reality. We embrace the opportunity for transforming the digital knowledge landscape and look forward to participating over the project's lifespan.

Sincerely,



Harry Bruce
Dean and Professor



PRESIDENT'S OFFICE

THE CENTRAL LIBRARY AT COPLEY SQUARE | BOSTON PUBLIC LIBRARY

700 BOYLSTON STREET | BOSTON | MA 02116 | 617.536.5400 | WWW.BPL.ORG

John D. and Catherine T. MacArthur Foundation
140 S. Dearborn Street
Chicago, IL 60603-5285

7/10/17

Dear MacArthur Foundation Board Members,

Please accept this letter in support of the Internet Archive's application to the MacArthur 100&Change Competition. This effort and project by the Internet Archive, with its direct and supporting partners, has the potential to truly democratize access to information and knowledge on a global scale. It is particularly opportune - now is the moment for such a project due to the following: we continue to approach global ubiquity of internet access and internet-enabled devices; the universe of published works is in fact still a finite number and thus addressable at scale; there is a strong desire for globalization to deliver on its promises of greater benefit to humanity, and this project promises a baseline and model for continued global access to information and standards of knowledge sharing.

The Boston Public library was a bold and transformative idea in 1848, when its charter was formalized, combining visionary leadership, private resources and an understanding of the public good, all to deliver unprecedented access to printed materials for the education and cultural enrichment of the general population.

We live in times that are both very different, yet filled with many challenges which resonate with that founding time. The Internet Archive's program, funded by the MacArthur Challenge, could be that new bold idea, one with global reach in our ever more connected society, one focused on ensuring no one is left behind in the race for greater access to knowledge, information access and technological enablement.

The Boston Public Library is committed to contributing to this initiative and to continue its long standing partnership with the Internet Archive, making our resources available to the greatest number of users possible.

In this respect, the phrase 'free to all' captures the essence of our mission and partnering with the Internet Archive scales that mission.

Our recent pilot program of lending digital copies of specific in-copyright Houghton Mifflin books provides a model of "one-to-one" lending that allows us to unlock previously unavailable out of print

materials for general public lending. This is a big step forward in crafting productive partnerships with publishers for in-copyright lending of previously non-digital titles, which the MacArthur grant could further leverage.

We have also identified special collections materials from the golden ages of English and Spanish literature, for example, of staggering rarity and which are not currently available in one place. While subsets are available behind paywalls, this is not material that should in any way be a revenue generator in its own right. Materials that seem obscure or interesting only from a historian's point of view, when considered in aggregate and in context (which online cross-linking makes possible), turn into a rich educational and cultural opportunity for learning.

The Boston Public Library fully endorses this application and stands ready to engage with this initiative.

Sincerely,

A handwritten signature in blue ink, appearing to read 'D. Leonard', with a stylized flourish at the end.

David Leonard

President, Boston Public Library



July 11, 2017

Board of Directors
John D. and Catherine T. MacArthur Foundation
140 S. Dearborn Street
Chicago, IL 60603

Re: Letter of Support for Internet Archive's proposal for 100&Change

Dear MacArthur Foundation Board Members,

I am pleased to offer the enthusiastic support of the Los Angeles Public Library to the Internet Archive's Open Library Project and declare our intent to advise and fully participate in the project. The proposal's objectives of increasing digital access to critical learning and research missing from the online environment matches up with the mission of the Los Angeles Public Library to provide free and easy access to information to enrich, educate, and empower every individual in our city's diverse communities. Librarians throughout the world are often asked about the relevance of libraries, since "everything is online now." The misperception that all information is available for free on the internet illustrates the need for libraries to develop partnerships to make available the breadth of human knowledge in a digital format.

The Los Angeles Public Library has deep collections in several subject areas that we are interested in sharing with the larger research community. We have an extensive collection of plays and screenplays and one of the largest drama collections in the country, which is heavily used by both the entertainment industry and local theater groups. The Social Sciences collection has a focus on books related to the history of social and civil unrest, which mirrors the social and political history of Los Angeles and the nation.

Our extensive international language collection could greatly expand the opportunity to make works available from under-represented communities. Spanish language is our largest collection, followed by Chinese, Korean, Russian, Armenian, Japanese, Vietnamese, and many other languages that reflect the rich history of the diverse urban population in Los Angeles. Several other collections at the Los Angeles Public Library are candidates for digitization including an extensive history of culinary arts, computer manuals from the inception of the PC to present, tracking the historical development of our contended world, and a rich collection of fiction set in Los Angeles dating back to the founding of the city.

John F. Szabo, City Librarian

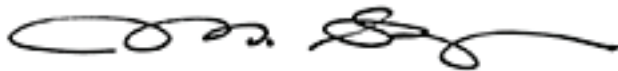
Board of Directors
John D. and Catherine T. MacArthur Foundation
July 11, 2017 – Page 2 of 2

We are thrilled to be a part of the initiative, and hope that it will bring some much-needed innovative thinking to inter-library loan systems, streamlining the process and making digital editions available while respecting the rights of authors. Currently, this process is slow and expensive – because of potential loss of items, some of the most valuable works are often unavailable for researchers.

The Internet Archive Open Library's digitize-and-lend model has the potential of freeing information from closed stacks, allowing the Library to move materials to offsite storage without compromising accessibility. Library spaces are evolving, and a greater variety of activities are happening in libraries, including providing spaces for active learning, co-working, and community gathering.

We are looking forward to collaborating with the Internet Archive and other partners in this venture and participate in unlocking analog collections and expanding access to information and knowledge.

Sincerely,

A handwritten signature in black ink, appearing to read 'John F. Szabo', with a stylized flourish at the end.

John F. Szabo
City Librarian

July 10, 2017

Board of Directors
John D. and Catherine T. MacArthur Foundation
140 S. Dearborn Street
Chicago, IL 60603

SUBJECT: Internet Archive Proposal for 100&Change

Dear MacArthur Foundation Board Members:

I am writing to express Sacramento Public Library's strong endorsement of the Internet Archive's Open Libraries Project, and to convey our intent to support and fully participate in this initiative. Our mission of providing access to information so that our communities will discover, learn and grow will be significantly furthered by this exciting project. As a library system that covers California's capital region, and serves urban, suburban and rural communities, we are excited by the idea of sharing our rich history and collections beyond our boundaries. This project addresses critical issues of access. That access benefits the community served by the most fundamental of democratic institutions, the public library.

Sacramento Public Library witnessed the impact of the Internet Archive's prototype Open Libraries prototype, and this project represents a logical next step for that important work and we want to be part of it.

Sacramento Public Library would be pleased to share the following:

- **Hmong-language materials** Sacramento's Hmong population is estimated to be the third largest in the United States, and while Sacramento Public Library's collection of Hmong-language materials is small, we purchase materials as they become available. In addition to classic Hmong materials, we avidly collect children's materials to help Hmong children discover classic picture books such as *Leo the Late Bloomer* and *It Looked Like Spilt Milk*.
- **Sacramento Room Special Collections** This resource collection is national and international in scope with a primary focus on Northern California. It includes books, pamphlets, photographs, scrapbooks, yearbooks, maps, videos, audio recordings, ephemera and other printed material. The collection pays particular attention to the experience of people of color, the disabled, youth, the elderly, and other groups which are often marginalized. As we know from the requests that we receive, there is voracious interest in these collections in locations far and wide.

- **California State Fair** Sacramento Public Library has had an annual presence at the California State Fair since 2014, providing programming as well as a glimpse of library services and innovations such as 3D printing, ebooks and electronic resources. We would like to expand people's awareness of digitized collections and can imagine our booth featuring real-time digitization of historic materials. Imagine the excitement on the part of the general public as they make the connection between those family photographs and preserving them for future generations.

Sacramento Public Library is busy inventing the future of public libraries. We know that our communities need to have access and opportunity and to experience the known and unknown. We are keenly excited about the potential of this project to make new strides in how the general population may find access to our shared history. This project allows the sharing of collections and creates a new model that recognizes the importance of both copyright and provenance. Just as importantly, this project has the potential to realize enormous cost savings to libraries, savings that can go into building collections instead of slowly and laboriously moving physical materials. It will help libraries with their ongoing on-site space management needs, another way that costs can be contained and services expanded at the same time.

As California's fourth largest public library and has a history of innovation including our I Street Press, a Library of Things and a fully-formed program to enable adults to receive accredited high school diplomas. We are excited about the opportunity to share our collections, resources and enthusiasm in this unique and exciting venture.

Sincerely,



Rivkah K. Sass | Executive Director



CHICAGO PUBLIC LIBRARY
CITY OF CHICAGO

July 10, 2017

Board of Directors
John D. and Catherine T. MacArthur Foundation
140 S. Dearborn St.
Chicago, IL 60603

SUBJECT: Internet Archive Proposal for 100&Change

Dear MacArthur Foundation Board Members,

I am writing to express Chicago Public Library's endorsement of the Internet Archive's Open Libraries Project.

Libraries have always been, and continue to be, in the knowledge business. This does not mean however that that we are static and unchanging institutions. Instead libraries have evolved to support knowledge creation and dissemination in ways that are relevant to our communities' changing needs. Chicago Public Library started as a small library with a few thousand books in 1873 and has expanded to 80 locations throughout the City. How our users access and interact with information over that time has changed and thus we provide a plethora of library materials both print and digital, as well as multimedia and collaboration spaces like YOUmedia and the Maker Lab where patrons become content creators.

Chicago Public Library's strategic vision is to create and implement innovative solutions that meet our patrons' changing needs as we provide access to all in order to nurture learning, support economic advancement and strengthen communities. The 100&Change project specifically aligns with the Library's strategy of delivering services not only within our walls, but also in patrons' homes, schools and workplaces through an online presence as well as by promoting fully inclusive policies that support a principle of free and open access. As we look to Internet Archive as a leader in our digital world, specifically when it comes to increasing the number of published materials available online, we believe their proposal holds immense possibility for enabling and empowering this work. The incredible possibility that the 100&Change opportunity would provide Internet Archive to move the digital library world boldly forward is one that holds great promise for Chicago and far beyond.

Thank you for your consideration of Internet Archive's innovative proposal. We look forward to the impact it can have on us all.

Sincerely,



Brian Bannon
Commissioner



New York
Public
Library

June 29, 2017

Board of Directors
John D. and Catherine T. MacArthur Foundation
140 S. Dearborn Street
Chicago, IL 60603

Dear MacArthur Foundation Board Members,

I am writing in support for the Internet Archive's grant proposal for the 100&Change program.

The Internet Archive has long been a leader and champion of efforts to build universal access to knowledge, a goal the New York Public Library also shares. As a public library -- in particular, with both research and circulating functions -- we are committed to the free availability of information for everyone across the world, especially those who face the greatest challenges. To this end, we support Internet Archive's effort to expand access to e-books and applaud their focus on individuals with print disabilities.

Over the past several years, the NYPL has been involved in an effort to improve the e-reading experience by creating an open library e-reader called SimplyE. This service is designed to allow libraries to provide e-books to their patrons for free, regardless of whether the content originates from commercial or non-commercial sources. Internet Archive is precisely the type of resource that SimplyE is designed to serve -- interested libraries and readers -- and we hope that other libraries will join us in such a partnership as we look to greatly expand upon the collections available to all.

Again, we fully support the Internet Archive's proposal and look forward to partnering with them in this latest endeavor.

Sincerely,

Anthony W. Marx

Office of the President

Stephen A. Schwarzman Building | Fifth Avenue and 42nd Street, New York, NY 10018
Phone: 212.930.0736 | Fax: 212.930.9299 | president@nypl.org



July 5, 2017

Board of Directors

John D. and Catherine T. MacArthur Foundation

140 S. Dearborn Street

Chicago, IL 60603

Dear Board of Directors:

I am very pleased to offer this letter of support on behalf of Multnomah County Library for the Internet Archive's proposal to provide libraries and learners free digital access to four million books. We applaud the Internet Archive for being selected as a semi-finalist for 100&Change, the competition for a \$100 million grant from the John D. and Catherine T. MacArthur Foundation.

Providing access to learning and the knowledge found in books, has long been a priority for Multnomah County Library and it is still one of our key priorities. "We champion reading" and our mission is "Empowering our community to learn and create." The library circulates over 19 million items annually (the fourth highest in the nation), but we realize that the use of physical books is declining while the demand for ebooks continues to climb.

In addition to the changing nature of the expectations of readers, Multnomah County Library has serious space constraints and new demands on our locations which limit the number of physical books that can be displayed in our libraries. We place a high priority on offering a rich and relevant collection, but libraries are for people and should not be warehouses for books in the modern age. As a library with increasing demands on our spaces for community connections, group learning opportunities and more, Libraries should not be book warehouses, but community forums. We can store the physical books we own offsite and make them available digitally through this model, freeing up spaces in libraries for people.

Partners like the Internet Archive are critical to helping libraries achieve a new vision for patrons. With \$100 million they could make 4 million books available anywhere, forever. In addition they will digitize many books published after 1923 that are just not available in ebook format yet, and for current and future generations this will be essential for their discoverability and to prevent their impending obscurity. Internet Archive has the capacity and technology to do this cost effectively, efficiently, and legally. Libraries should be able to lend the physical books we own in digital formats, based on the current and sound interpretation of copyright laws.

We value the work of the Internet Archive and look forward to seeing this proposal selected as the winner of 100&Change and for our participation to lead to more positive outcomes for Multnomah County residents in the coming years.

Sincerely,

A handwritten signature in black ink, appearing to read "Vailey Oehlke".

Vailey Oehlke

Director of Libraries



GEORGETOWN LAW

Michelle M. Wu

Associate Dean for Library Services
Professor of Law

June 30, 2017

Dear MacArthur Foundation Board Members,

I am writing today to express my strong support for the Internet Archive's (IA) vision to democratize access to information in its proposal to the MacArthur Foundation's 100&Change competition.

As the largest law school and second largest law school library in the nation, the Georgetown University Law Center and its library are committed to social justice, as reflected in our motto, "Law is but the means, justice is the end." Through the efforts of our faculty, centers, institutes, student groups, and alumni, we seek to make the law accessible, understandable, and effective in representing the many different interests worldwide. Past examples of our library's efforts include our hosting of federal circuit court opinions on our website before the courts themselves had the ability to provide access, partnering with the District of Columbia to [post opinions from their historic preservation offices](#), and serving as the home for the [National Equal Justice Library](#). Currently, we have been seeking collaborative partners to digitize and make publicly available public documents (e.g., circuit record and briefs) generally found only in microformat. We are also partnering with the Internet Archive to lend our digital collections.

The project outlined by the IA in their 100&Change proposal holds the promise of bridging one of the most dangerous divides of our time: an informational divide caused by the growing economic inequality in the United States. Poorer regions suffer from a variety of deficiencies, including lack of adequate funding for schools, public services, and libraries. This project would make possible the maximization of public investment in informational resources, not just for the benefit of the wealthy but also the neighborhoods that would otherwise never have access to rich information stores. Books purchased by wealthier neighborhoods could be made available for lower-resourced communities through interlibrary loan as they are now, but without incurring the shipping costs associated with ILL. Without the reduction in transaction costs made possible by digital delivery, these poorer communities may never have the opportunity to hear from diverse voices on issues stretching across the globe. Granted, even if this project succeeds, it is only one step. There are other barriers, like the digital divide, that will influence how impactful this would be, but the potential benefits themselves are staggering even should other divides persist.

111 G Street, NW, Washington, DC 20001-2075
PHONE 202-662-6191
michelle.wu@law.georgetown.edu

IA's vision echoes back to the Founders' vision for copyright in the United States. Article I, Section 8, Clause 8, of the United States Constitution grants Congress the power "**To promote the progress of science and useful arts**, by securing for limited times to authors and inventors the exclusive right to their respective writings and discoveries." (emphasis added) The end purpose of copyright was always for the public benefit, as knowledge was seen as being essential to an informed democracy. In crafting the nation's copyright framework, therefore, Congress enacted laws to maintain a balance between copyright holders and the public interest and has reiterated that necessary balance in every subsequent major piece of copyright legislation.

Copyright owners have already taken advantage of technology to expand their reach; where works used to be sold only by itinerant booksellers, they can now be distributed to millions instantaneously through the use of technology. Through technology, they have cut printing and shipping costs dramatically and reduced the necessity for overruns. Copyright owners have also developed new formats and new streams of commerce, some of which artificially limit the usefulness of works through the adoption of technology that has a limited lifespan. It is past time that technology is added to the other side of the scale, the side that speaks for the public interest. The concepts of collaboration, shared online collections, and controlled digital lending contained in IA's proposal restore copyright's balance, by allowing libraries to achieve the full value for the works they have purchased throughout the lifetime of the work. Libraries will continue to purchase works, ensuring that authors continue to receive remuneration for their creations, but they will also exercise the right to use what they have purchased even as technology changes.

Words cannot express how enthusiastic I am about IA's proposal, the promise it holds, and the necessity for it in a world where the divide between the haves and have nots only grows. This project contemplates a world in which resources can be used for the good of the whole of the nation, not just for the few.

Sincerely,

A handwritten signature in black ink, appearing to read 'Michelle M. Wu', with a stylized, flowing script.

Michelle M. Wu
Associate Dean for Library Services



Dear MacArthur Foundation and Board Members,

It was in 1999 when I first started to say “If you want to figure out what Google is going to do look at what Brewster Kahle and the Internet Archive did 5 years ago”. It was true then and remains true today - archiving the web, scanning books, scaling it globally, the WayBack Machine. And on and on.

There is no organization on Earth more committed to creating, preserving and distributing our digital heritage.

I say this as a former top engineering executive at Google and Facebook. As a co-founder of One Laptop per Child and its first CTO, and as a lauded technology innovator. When I die my estate is going to the Internet Archive.

The Internet Archive, and the world of information users (that’s all of us) would benefit greatly from some small fraction of the muscle that the Archive’s powerful for-profit peers have, for it to effect the enormous positive change that it has in its mission.

There is a lost century of books from when copyright laws changed in the 1920s. Changes in law and policy have blocked the digitization and the dissemination of books since then. We lose our very history as it gets blocked and re-written - the books that formed many of us are not - and can not be - digitized and thus part of our history becomes inaccessible to future generations.

Luckily the town libraries have copies of these books.

The partnership of the Internet Archive with the country’s town libraries can enable modern digital access for the libraries. Perhaps more important is that working with these libraries’ archives can vastly extend the digitized lending library for the lost century of books. For each copy of Rachel Carson’s Silent Spring on the shelves of local libraries - another copy can be put into perpetual worldwide digital lending. And so it is for each book on the shelves of these libraries.

The Internet Archive embodies the best spirit of our time - to make information available to all - without profit motive, without discrimination or censorship on what the information is to be. Today, as the idea of knowledge as core to our culture is itself under attack, the Archive is our Library of Alexandria. Let's defend and propagate it!

Sincerely,

A handwritten signature in black ink, appearing to read 'MLJ', with a stylized flourish at the end.

Dr, Mary Lou Jepsen
Founder and CEO, Openwater (www.opnwatr.io)

Abby Smith Rumsey
24 Beulah Street
San Francisco CA 94117
abby@asrumsey.com
rumseywrites.com

June 30, 2017

Dear MacArthur Foundation Board Members:

I write to offer strong support for the Internet Archive's proposal for the 100 & Change competition. Bringing 4 million books online through purchase and digitization represents a breakthrough model for libraries to continue their vital work of providing access to knowledge in the digital age.

My three decades of professional experience working at the Library of Congress, the Council on Library Information Resources, the Scholarly Communication Institute at the University of Virginia, and service on the National Science Foundation's Blue Ribbon Task Force on the Economics of Digital Preservation and Access has given me front-line exposure to the promise and turmoil of digital delivery of information. For digital natives, online access—be it on the web, through apps, or via cloud services—is the default mode of reading. If a book is not accessible online, it will not be found and used. The knowledge held within it will be as good as lost. That is why libraries and archives are dedicating what resources they have to put the pre-1923 heritage of public domain knowledge online.

Paradoxically, it is the 90 years of recent publications, from 1923 to the present, that libraries cannot deliver to their readers online. The Internet Archive is assembling a network of libraries to provide at-scale circulation of 4 million books from this period. This will enable libraries that own a physical book to provide their patrons with temporary access to that book in digital

form, under the same restrictions libraries currently impose—one eBook to one reader at a time.

The founders of the American republic believed that a self-governing people have the right to unfettered access to information in order to fulfill their responsibility to be informed citizens. That is why libraries have long been pillars of democratic practice, supported by both public and private funding and undergirded by a copyright regime that enables libraries to lend books, moving images, and recorded sound while protecting the privacy of each reader and the rights of creators. This critical linchpin of democracy is imperiled by a copyright regime that has yet to catch up with the realities of digital access. The Internet Archive is offering a secure, scalable solution to this challenge while the sociopolitical system normalizes the access our democracy demands.

The Internet Archive is uniquely positioned to move this vital project forward. Libraries are committed to continue their core mission in the midst of powerful technological and format changes. Yet they cannot operate at the scale that is required for providing new service models without collaboration with the Internet Archive. The Archive's modeling and testing of new digital services is uniquely influential, as the adoption of their web crawling tools attests. Pioneered by the Internet Archive, these tools are now commonly used by research institutions and libraries to collect, preserve, and make accessible web-based content for the communities that they serve.

What is at risk if we do not act now is not just the content of these books. At this juncture in time, democratic practices are threatened by floods of unvetted, unverified media feeds about current and past events. We need more, not less access to information that has been vetted for quality, the very definition of what a published book is. Writers, editors, proofreaders, publishers, reviewers, and the librarians who make informed decisions about what to acquire are all vital links in the chain of quality intrinsic to published books.

The Internet Archive is keenly aware of what is at risk in this time of transition from hard copy to digital. To ensure access, they have dedicated decades of hard work, informed by innovative thinking and powered by a zeal to serve the public good that is widely recognized and honored in the United States and abroad. I respectfully urge the members of the board to fund this project. It will greatly enhance the ability of individuals to seek knowledge today and for generations to come.

Sincerely yours,

A handwritten signature in blue ink, appearing to read 'Abby Smith Rumsey', with a stylized, cursive script.

Abby Smith Rumsey



July 7, 2017

MacArthur Foundation Board Members
John D. and Catherine T. MacArthur Foundation
140 S. Dearborn Street
Chicago, IL 60603

Re: Internet Archive's *OpenLibraries* Initiative

Dear MacArthur Foundation Board Members,

I am writing to express the Electronic Frontier Foundation's strong support for the Internet Archive's proposal to the MacArthur Foundation's *100&Change* competition. EFF supports this proposal because we know that the Internet Archive's work will help fulfill the promise of the Internet—truly universal access to knowledge. We are particularly excited by the Archive's vision to maximize access to knowledge for traditionally disadvantaged communities, including those constricted by distance, time, income and disabilities. With support from the MacArthur Foundation, the Archive can make that dream a reality.

I've known and worked with Brewster Kahle for more than ten years, as an EFF client, as a fellow advocate on a range of issues and as a member of EFF's board of directors. The Archive's mission aligns easily with EFF's: we share a fundamental commitment to ensuring that new technologies serve, rather than inhibit, the public interest. In line with that goal, we have worked closely with the Internet Archive to find ways to expand their collections and to defend a library's right to protect the privacy of its readers, including from improper government demands for information. We know that libraries have a special dedication not just to access, but also to preservation. We also know that, unlike some commercial entities, libraries like the Archive protect reader privacy by never unnecessarily harvesting, or selling, the personal information of patrons. The Archive's leadership in upholding that tradition in the 21st century has been vital to protecting open knowledge and Internet freedom.

I also know that Brewster leads a dedicated, hard-working team that has accomplished extraordinary things on a shoestring budget. Many organizations set ambitious goals. The Archive fulfills them. As a result, the Archive has become an invaluable resource for people all over the world.

EFF and the Archive have worked together many times on briefs and public advocacy concerning the careful balance between the incentives copyright law offers to authors and publishers with the broad public interest goals of digital libraries. We believe the Internet Archive's plan to expand the collection of digital books and make them available to the print disabled, journalists, scholars and the public will serve the purposes of copyright by fostering new creativity and innovation, encouraging new transformative uses, and promoting access to

works that are now hidden away in the dusty archives of small and large libraries around the United States.

We join the Internet Archive in believing that access to knowledge is an inalienable right—and a pillar of our democratic system. When some of our citizens face towering barriers to knowledge, democracy suffers. Now more than ever we need to put the best information in front of our citizens, while at the same time protecting their right to access that information without sacrificing their privacy. We know the Archive is committed to doing both.

We wholeheartedly support the Internet Archive's proposal and look forward to working with them to make this program a success.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Corynne', with a long horizontal flourish extending to the right.

Corynne McSherry
Legal Director
Electronic Frontier Foundation



1875 Explorer Street, 10th Floor
Reston, VA 20190

The President and the Board of the John D. and Catherine T. MacArthur Foundation
140 S. Dearborn Street
Chicago, IL 60603-5285

Dear Board Members,

I am writing in support of the proposal from the Internet Archive to expand its efforts to preserve modern digital artifacts (among other media) in response to the call for proposal from the MacArthur Foundation. I have known and worked with the Internet Archive's founder, Brewster Kahle, for many years and have found his leadership and his team's dedication to be refreshing and vital to the effort to preserve our digital heritage. I am sure that the Archive team has documented its work to date so I will not reiterate that here.

They have been extraordinarily clever in their implementation of a Web archive and recently added a browser plug-in so that a "404 page not found" message from the browser automatically invokes a search of the Internet Archive in case that page sought was captured in their "crawl" of the WWW. The WWW can barely contain itself let alone archive itself, so efforts to explicitly capture our increasingly digital history require extraordinary measures and it is gratifying to know that the MacArthur Foundation recognizes that need.

Brewster and his team understand big visions - something the MacArthur Foundation has demonstrated a remarkable ability to discover and support. The 100&Change effort is a good example of that.

I am strongly persuaded that the selection of the Internet Archive for digital preservation will be an investment well made and endorse without reservation their proposal.

Sincerely,

Vint Cerf
VP and Chief Internet Evangelist
Google

Evidence of Engagement

Social Media, Videos & Web



Social Media @InternetArchive

#100andChange

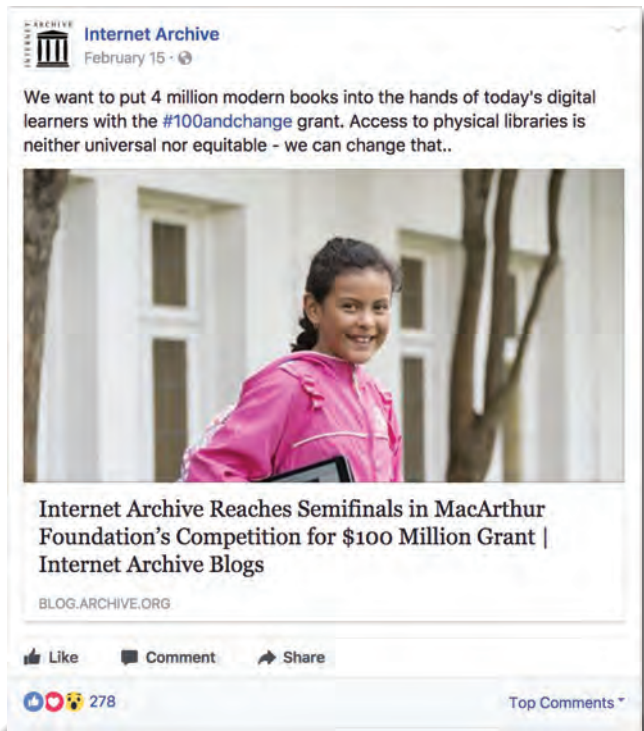
+242k Unique Impressions

35 Posts about Open Libraries

+ 118k Followers

392,854 Total Impressions

7,165 Engaged Users



 **85.3K Followers**

59 #100andChange mentions

165 Average Engagements

14,194 Average Impressions

92 Tweets about the Open Libraries Project

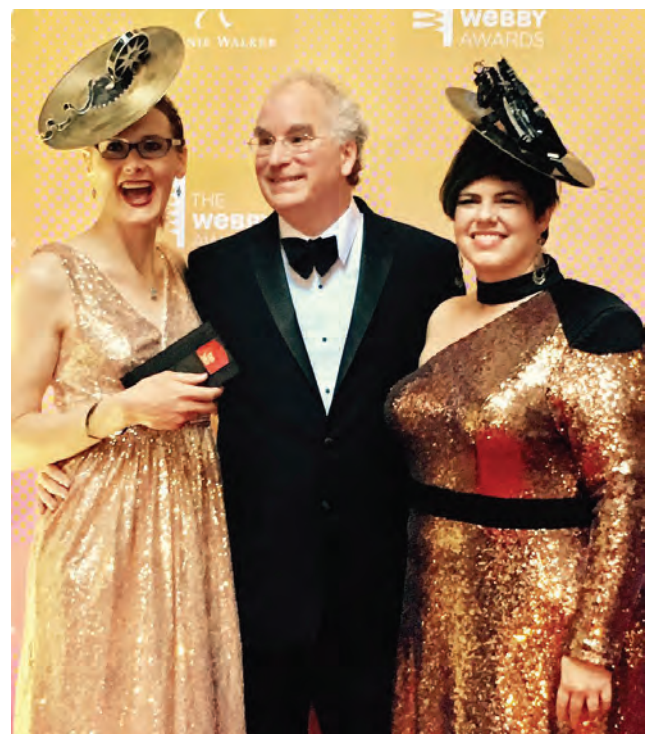
Multimedia and Awards

Brewster Kahle presents “The Library of 2020 — Building a Collaborative Digital Collection of 4 Million Books” during a **Facebook Live event at the 2017 American Library Association** meeting in Chicago in June. The livestreamed session reached over 15k people with 4.2k views.


<http://bit.ly/2tmaYWF>

<http://bit.ly/2suiVzK>

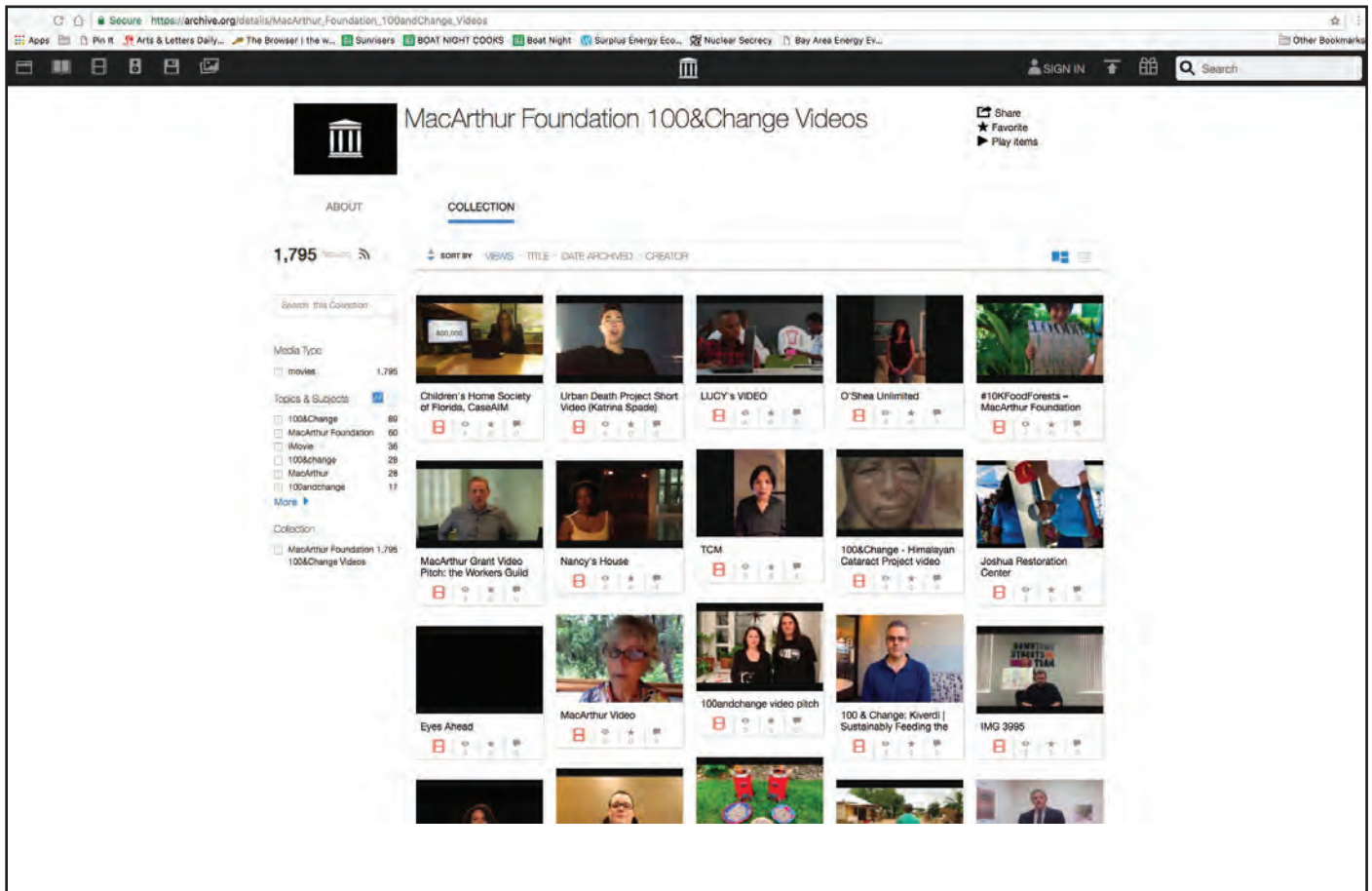
Wendy Hanamura, Brewster Kahle, and John Gonzalez field 25 questions during an Internet Archive AMA. Over **38 participants commented or asked questions** during the 90-minute conversation in June 2017. The video has over 500 views online.


<http://bit.ly/2tmaYWF>

“...one of the Internet’s highest honors...”

-New York Times

Tracey Jaquith, Brewster Kahle, and Alexis Rossi accept a Lifetime Achievement Award on behalf of the Internet Archive at the 21st Webby Awards in May 2017. The Archive was lauded in by the host for being “the web’s most knowledgeable historian.”



The Wayback Machine team has curated a collection featuring 1,795 100&Change submission videos to host online forever.

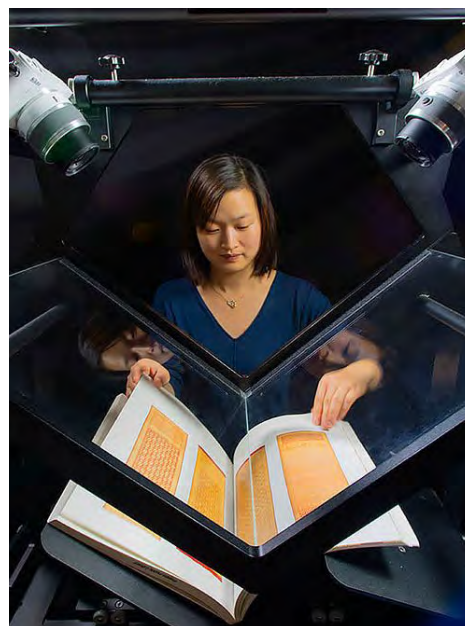
Launched in 2001, the Wayback Machine preserves the history of the web.



We all want to see the modern day Library of Alexandria, a digital library where the published works of humankind—all the books, music, video, webpages, and software—are available to anyone curious enough to want to access them. I believe now is the time to build it.

- Brewster Kahle

Biographies of Key Staff



**Brewster Kahle**

Founder &
Digital Librarian

A passionate advocate for public Internet access and a successful entrepreneur, **Brewster Kahle** has spent his career intent on a singular focus: providing Universal Access to All Knowledge. He is the founder and Digital Librarian of the Internet Archive, one of the largest digital libraries in the world, serving over one million patrons each day. With 170 staff members in the United States, Canada, England, and China and digitization centers at the Library of Congress, Princeton University, University of Toronto, and Boston Public Library, the Internet Archive works with more than 500 library and university partners to create a free digital library, accessible to all.

Since founding the Internet Archive in 1996, Kahle continues to guide all aspects of the organization including policy, strategic direction, and the development of new technologies. He is a prolific writer, speaker, and advocate for ways we can create technology that reflects our deepest values: privacy, security, and accessibility. Under Kahle's leadership, the Internet Archive launched the Wayback Machine, the only public archive of the web, and archive.org remains one of the 300 most popular websites in the world.

Soon after graduating from the Massachusetts Institute of Technology where he studied artificial intelligence, Kahle helped found the company Thinking Machines, a parallel supercomputer maker. He is an Internet pioneer, creating the Internet's first publishing system called Wide Area Information Server (WAIS) in 1989. With The Wall Street Journal as its first customer, the company helped revolutionize the electronic publishing market. Kahle eventually sold the company to America Online. In 1996, Kahle co-founded Alexa Internet, with technology that helps catalog the web, selling it to Amazon in 1999.

Brewster Kahle

Founder & Digital
Librarian

Kahle and his wife, Mary Austin started the Kahle-Austin Foundation, which supports the Internet Archive along with other non-profit causes. Kahle is a founder of the Open Content Alliance, a group of organizations contributing to a permanent, publicly accessible archive of digitized texts. He is a Fellow of the American Academy of Arts and Sciences, a member of the National Academy of Engineering, and serves on the boards of the Electronic Frontier Foundation, Public Knowledge, The European Archive, and the Television Archive.

Elected to the Internet Hall of Fame, Kahle is also the recipient of the 2004 IP3 Award from Public Knowledge, the 2009 Free Software Foundation Award, and the Paul Evan Peters Award, which is bestowed jointly by the Coalition of Networked Information, the Association of Research Libraries, and EDUCAUSE. For his innovative use of technology and continuous efforts to provide universal access to all human knowledge, Simmons College presented Kahle with the degree Doctor of Computer Science, honoris causa. In 2009, he was named by Utne Reader as one of the “50 Visionaries Changing Your World.”



Wendy Hanamura

Director of
Partnerships

Wendy Hanamura is the Director of Partnerships at the Internet Archive, one of the world's largest digital libraries. Passionate about using stories to accelerate social change, Hanamura uses her communication skills to share the remarkable mission of the Internet Archive—providing people everywhere with equal, unfettered access to knowledge. After decades working as a journalist and a leader at a nonprofit national television network, Hanamura has helped guide the strategic direction of the Internet Archive since 2014.

Hanamura manages the Internet Archive's *Open Libraries* project, which seeks to bring millions of digital books to billions of people around the world. As the project lead, Hanamura helps shape both the project's design and the team who is building this new digital infrastructure for US libraries. A master juggler, she is equally at home writing copy, managing teams of hundreds, balancing budgets, and communicating a compelling vision for transformational change to everyone from presidents to public television audiences.

At the Internet Archive, Hanamura helped stage the world's first Decentralized Web Summit in 2016. She built a partnership with the Japanese American historical organization, *Densho*, to preserve thousands of first-person oral history videos about the WWII incarceration of Japanese Americans within archive.org. Nothing is more important to her than preserving the stories of the past for future generations, so they might avoid our mistakes and learn from our triumphs.

Previously, Hanamura served as Chief Digital Officer of KCETLink and Vice President and General Manager of Link TV, a national nonprofit television network dedicated to connecting Americans to the world. There she launched an international film contest highlighting solutions to some of the world's toughest global development problems. She led a campaign sharing

Wendy Hanamura

Director of
Partnerships

the diverse stories of Muslims in America. She helped build a global news video app that provided readers with facts, context, and possible actions related to the issues.

Hanamura began her career in journalism as a researcher and photo editor for Time magazine. She's reported and produced television content around the world for CBS, World Monitor Television, NHK (Japanese Broadcasting Corporation), and PBS. Her favorite project remains *Honor Bound: A Personal Journey*, the national documentary she produced about her father and his storied WWII unit, the Japanese American 442nd Regimental Combat Team.

Hanamura serves on the boards of the Ruddle Memorial Youth Foundation, supporting innovative programs for at-risk youth, and Whose Knowledge?, a global campaign to make the information on the internet more diverse. She volunteers her time as a moderator at the Clinton Global Initiative University, an interviewer for Harvard College, and a fundraiser for the Topaz Museum. Hanamura graduated *summa cum laude* and Phi Beta Kappa from Harvard University, and she was a Rotary International Fellow at the University of Tokyo, studying architecture with Fumihiko Maki.



John Gonzalez

Director of
Engineering

John Gonzalez has been at the Internet Archive for three years working to support, coach, and lead the technology and operation teams at the heart of the Internet Archive service delivery. His role has allowed him to apply over 30 years of experience in business and technology management to the Internet Archive mission of Universal Access to All Knowledge.

Immediately prior to his position at Internet Archive, Gonzalez directed product strategy and development for multiple content management offerings. From 2005 to 2014 he was Director of Content Management Products at Xerox where he managed a \$22 million product line of document management products. From 2001 to 2005 he was VP of Product Management and Strategy for Clearstory Systems (WebWare Digital Asset Management software). In the late 1990's Gonzalez was part of the Getty Images Corporate Business Development team as VP of Business Development where he participated in the acquisition and integration of multiple digital stock photography companies and negotiated business partnerships with Adobe, Lycos, AltaVista, and other iconic early-internet organizations.

Gonzalez has consistently demonstrated passion for improving access and opportunity for youth in underserved populations. Throughout his professional career, he has volunteered time tutoring and mentoring students from families of color and contributing skills and resources to organizations focused on advancing the availability and quality of education for underserved youth. This commitment was redoubled when Gonzalez's oldest child, Raphael, was diagnosed with dyslexia.

Starting in 2009, Gonzalez served on the Board of Directors for the San Francisco Children's Creativity Museum, including two years as Chairman and two years as Treasurer. The Children's Creativity Museum provides

John Gonzalez

Director of
Engineering

youth (ages 2-12) with experiences and programs designed to expand creative literacy and design thinking. During his six-year tenure, Gonzalez worked with and then led the CCM board to expand patron demographics and to stabilize financial and organizational scaffolding. Located in the heart of low-income neighborhoods of San Francisco, CCM continues to provide highly engaging and educational experiences for youth of all backgrounds and demographics.

In May 2017, Gonzalez joined the board of the Buck Institute for Education (BIE), an organization whose highest priority is to help teachers prepare K-12 students for successful lives. The strategic focus of BIE is to enhance educational outcomes for all students, but especially for those in the US who are furthest from opportunity and resources.

He earned a BS in Computer Science with honors from MIT and a MBA from Stanford Graduate School of Business.



Jim Michalko

Senior Strategist

Jim Michalko became the Sr. Strategist for the Internet Archive's *Open Libraries* after retiring from his position as VP, Research Libraries at Online Computer Library Center (OCLC) in March 2016. Known for his success coordinating large-scale, national, collaborative multi-stakeholder library projects, Michalko leads the outreach efforts for the Internet Archive's ambitious project to digitize and lend millions of books.

At OCLC, a nonprofit global library cooperative with more than 16,000 member libraries in 100 countries, Michalko had primary responsibility for research library relations and the OCLC Research Library Partnership. The transformative impact of technology on the delivery of library and information services has been the primary thread through Michalko's long career. He was the CEO of the Research Libraries Group (RLG), a US-based international consortium of research libraries, archives, law and museum libraries that operated collaborative library programs and technical systems.

During his career at RLG, it grew from a small operation funded by the four founding institutions and operated out of a trailer on the Stanford campus to a global library cooperative sustained and governed by 165 of the world's great libraries. These member libraries built and operated the RLG Union Catalog which supported cataloging and discovery services for more than 1200 major libraries across the US, Europe and Asia.

In addition to the technical infrastructure and services that RLG delivered to the library community, it mobilized its members to address shared problems that required collaborative solutions. A generation of current senior library leaders launched their careers and grew their expertise and networks in the dozens of working groups that RLG created and coordinated over the decades.



Jim Michalko

Senior Strategist

Similar to many in the library community, the work runs in the family. His mother worked as a librarian in his neighborhood Carnegie library near the steel mills in Cleveland, Ohio where he grew up. He has fond memories of freely roaming the library while his mother gave English classes to the Czech and Slovak residents of the neighborhood.

Since then Jim has been privileged to have many of the great research librarians as mentors and has paid it forward by mentoring many of the next generation who are now senior managers running great libraries in the US, UK and Australia.

Michalko holds graduate degrees from the University of Chicago (MBA and MLS) and was an undergraduate at Georgetown University (BA). He's a dedicated reader and a supporter of various women's shelters and restorative justice groups on the San Francisco Peninsula.



Lila Bailey

Policy Counsel and
Lecturer at Berkeley
Law, University of
California

Lila Bailey is Policy Counsel for the Internet Archive where she advises on the complex legal and policy issues associated with democratizing access to knowledge. She is also a lecturer at Berkeley Law, most recently teaching a course in the Fundamentals of Internet Law.

Prior to becoming the Internet Archive's in-house counsel, Bailey was the founder and principal attorney at The Law Office of Lila Bailey, specializing in digital copyright and privacy issues for individual entrepreneurs and creators, early stage startups, Internet platforms, and libraries. From 2011-2013, Bailey was a Clinical Teaching Fellow at Berkeley's Samuelson Law, Technology & Public Policy Clinic, where she managed and mentored student attorneys as they tackled cutting edge work in public interest technology law and policy. Bailey's work there included advising a Civil Rights group on the copyright issues involved in making historical materials available in digital form, working on privacy issues associated with California's "smart" electricity grid, and drafted a white paper on the benefits of flexible copyright exceptions and limitations for libraries outside the U.S.

Prior to this, Bailey was counsel for Creative Commons, a nonprofit organization offering open copyright licenses that allow the sharing of creative works under flexible licensing terms. In this capacity, Bailey worked with the Open Educational Resources community, to make high-quality educational materials freely available under terms that allow anyone, anywhere, to access, customize, and share those resources via the Internet. Bailey held an Intellectual Property Fellowship with the Electronic Frontier Foundation in 2007, helping Internet users push back against abusive DMCA takedown notices and supporting EFF staff on the early stages of the *Lenz v. Universal Music Group* case (a.k.a. "the Dancing Baby case"). Bailey served as an associate at Perkins Coie, where she worked on copyright, patent, and



Lila Bailey

Policy Counsel and
Lecturer at Berkeley
Law, University of
California

trademark litigation. In 2006, she won the firm-wide Pro Bono Leadership Award for billing over 600 pro bono hours for the Internet Archive.

Bailey is a frequent speaker on digital copyright issues nationwide. She received her JD from Berkeley Law and her bachelor's degree in Philosophy from Brown University.

**Brenton Cheng**

Senior Engineer,
Books Presentation

Brenton Cheng spearheads the technical and product development of Open Library, a user-curated catalog of over 16 million books, as well as book presentation and services on Archive.org. He combines deep technical experience with decades of project leadership.

Open Library's mission is to provide "One web page for every book." In addition to displaying complete metadata listings used by book aficionados, librarians, researchers, and casual browsers, Open Library links to a storehouse of book information: 2.5 million books readable on Internet Archive, WorldCat's holdings information, and listings from online bookstores such as Better World Books and Amazon.com. Open Library relies on the strength of its volunteer community members, from editors to software developers who contribute to the site's evolving codebase.

Cheng is also responsible for the book-related services and front-end user experience on the Archive.org website. He has made numerous improvements to the book ingestion pipeline, from scanning and optical character recognition (OCR), to the design and functionality of the Internet Archive BookReader, a custom-built open source in-browser ebook reader.

Previously, Brenton was Senior Director of Product and Technologies at Stringwire, a live streaming video platform for citizen journalists. There he led a team of six developers across five countries in website development for mobile apps.

Brenton received a BSE Magna Cum Laude in Mechanical Engineering from Princeton University and an MSME in Biomechanical Engineering from Stanford University. He is also an adjunct professor in the Performing Arts and Social Justice program at University of San Francisco, specializing in movement awareness and training for actors and dancers.

**Tracey Jaquith**

Senior Engineer &
Architect

Tracey Jaquith is a founding engineer and system architect for Internet Archive since 1996, writing multi-threaded servers, crawlers, and more. She wrote the “what’s related” services that ultimately led to Alexa Internet’s acquisition by Amazon. An inventor with two patents, she is the Archive’s longest tenured employee after founder, Brewster Kahle.

In 2000, Jaquith left for four years to be the technical lead and founding engineer at a financial startup focusing on more efficiently trading convertible bonds.

Recently, Jaquith rewrote Internet Archive’s TV recording system as an open source single server system, capable of preserving 75 simultaneous 24x7 channels, and developed the Television Archive’s “full stack” first and second versions. For more than a decade, Jaquith held primary responsibility for archive.org and its full stack infrastructure, later launching a fully responsive “Version 2” of the archive.org website—migrating to jQuery, bootstrap, LESS, modern faceting, Elasticsearch, postgresSQL and more. She is leading the core infrastructure migration to Docker for archive.org’s in-house AWS and S3-like system. *Open Libraries* services will rest upon the infrastructure Jaquith is designing.

Jaquith’s first job was at Xerox PARC, writing core low-level C-language image processing and comparison algorithms using novel computational geometry based on research from her Master’s degree.

Jaquith holds a Master’s and Bachelor’s in Computer Science from Cornell University where she focused on machine vision, robotics and mathematics. Jaquith presents at conferences (Demuxed 2016, MozFest) and is a regular guest lecturer at colleges about news and broadcast technologies.

**Micah May**

Ebook Strategist

Micah May is a global industry thought leader in e-content service and digital platform building for nonprofit communities. May is currently helping the Internet Archive and Digital Public Library of America to develop ebook strategies for libraries. He is also guiding operations for Library for All, an NYC-based nonprofit dedicated to delivering reading to the developing world. May recently helped five large publishers identify ways to leverage data across their core businesses and develop new data-driven publishing business models.

From 2009-2016, May was a Senior Director at the New York Public Library, where he led innovation and partnerships, business development, and strategy. While at NYPL, May worked closely with the White House to secure more than \$250M in ebook donations from publishers for *Open Ebooks*, an app-based library for children in low-income communities. He conceived and directed the development of *SimplyE*, an open source platform that delivers ebooks from diverse sources to users in three clicks or less. May also led the founding of NYPL Labs, an award-winning experimental design group that launched the first library crowdsourcing project in the US.

Before joining NYPL, May worked at McKinsey & Company where, in addition to serving clients in banking, insurance and pharma, he helped to spearhead and manage a new research and development group for advanced problem-solving techniques being used by the firm for the first time.

May received his Juris Doctorate from Harvard Law School in 2005 and his B.A. in Philosophy and Political Science, magna cum laude, from the University of Colorado at Boulder in 2001.

**John Fraser**

President & CEO,
New Knowledge
Organization Ltd.

John Fraser is President & CEO of New Knowledge Organization Ltd., an interdisciplinary social science think tank collaborating with change-makers to build a strong, healthy democracy and thriving biosphere. He is a conservation psychologist, architect, and educator whose research focuses on how our experience with cultural institutions influences learning, attitudes, and motivations for engagement with solving the problems that face society.

Over the past 15 years, he has worked with libraries on public programming impacts, and co-edited of *The Language of Conservation*, a book summarizing research on the role of libraries, museums, and poetry as cultural change agents. He has studied and published on the convergence of library and museum practice. Fraser was a key partner in the development of the National Impact of Library Public Programs Assessment strategy, which was implemented by the American Library Association's Public Programs office and was an advisor to the Public Library Association as they developed their Measuring Impact program.

He is Adjunct Professor at the Center for Public Health at Indiana University Purdue University Indianapolis (IUPUI) and a Media Impact Fellow at the USC Annenberg School for Communication and Journalism. He is the Editor-in-Chief of *Curator: The Museum Journal* and President-Elect of the American Psychological Association's Division 34, Society for Environment, Population and Conservation Psychology.

**Beverly Sheppard**

Research Fellow,
New Knowledge
Organization Ltd.

Beverly Sheppard is a Research Fellow at New Knowledge Organization Ltd. and has deep expertise in strategic and interpretive analysis and planning for non-profit institutions. She has led numerous projects developing and exploring the learning intersections between museums, libraries, and other community-based institutions. She was President and CEO of the Institute for Learning Innovation, a center for learning research and evaluation in informal settings.

Ms. Sheppard's museum experience spans nearly thirty years and includes positions such as former Acting Director of the federal agency Institute of Museum and Library Services and President and CEO of Old Sturbridge Village in Massachusetts. She has long been engaged in leadership activities within the museum field, serving on both the Board of Directors of the American Association of Museums and the Council of the American Association for State and Local History.

Ms. Sheppard is a frequent speaker and writer in the informal learning field, with publications including *An Alliance of Spirit, Museum and School Partnerships*, and *Thriving in a Knowledge Age* with co-author John H. Falk. Sheppard was a key member of the team developing the National Impact of Library Public Programs Assessment.

**Chris Coward**

Director of the
Technology &
Social Change
Group (TASCHA),
University of
Washington

Chris Coward is the co-founder, Principal Research Scientist, and Director of the Technology & Social Change Group (TASCHA) at the University of Washington Information School. Under his leadership, TASCHA has grown in size and scope, encompassing research in over 50 countries, exploring opportunities for information and communication technologies to foster equitable social change. As an applied research center, TASCHA devotes particular energy to designing projects in collaboration with partners to advance insights and innovations for practitioner and policy communities.

Over his career, Coward's research interests have focused around impact evaluation, digital inclusion, digital skills, employability and entrepreneurship, and innovation spaces. For the past decade, he has devoted his energy to advancing the role of public libraries around the world as centers of learning, creativity, and community development. Much of this work explores ways for libraries to develop innovative programs and services that combine the library's core assets—social space, trained professionals, digital infrastructure, and community standing, among others—with ongoing advances in information and communication technologies. As one of three Legacy Grant recipients from the Bill and Melinda Gates Foundation's *Global Libraries*, TASCHA is exploring public libraries as platforms for civic engagement, an effort that seeks to create novel approaches for libraries to engage their communities on issues of common importance.

Coward serves on a number of professional committees and grant review panels and is a frequent contributor at conferences and other convenings as a proponent of a globally inclusive internet. He holds a Master of Public Administration and a Master of Arts in International Studies, both from the University of Washington.



Carole Palmer

Professor, Associate
Dean for Research,
University of
Washington
Information School

Carole Palmer is a Professor and the Associate Dean for Research at the Information School at the University of Washington. She holds a Ph.D. in Library and Information Science from the University of Illinois at Urbana-Champaign. Her research investigates information work in the digital age, with a focus on data curation and digital research collections for interdisciplinary inquiry. Her current work examines the reuse value of data, the access and use of data and information across disciplines, and emerging best practices in data services. Currently, Palmer leads the IMLS funded Open Data Literacy project aimed at preparing information professionals to curate collections of open data of value to local communities and to build the infrastructure and preservation environments needed to sustain open data collections. She is also co-PI on the NSF-funded Qualitative Data Repository project.

As an educator, Palmer has been a leader in data curation workforce development for more than a decade, recognized in 2013 with the Information Science Teacher of the Year Award from the Association for Information Science & Technology.

She has served on two National Academy of Sciences study committees — Preparing the Workforce for Digital Curation and Building Cyberinfrastructure for Combustion Research. She is currently an elected member of the technical advisory board for the Research Data Alliance, she sits on the steering committee for the National Data Service, and she serves on the external advisory board for the National Socio-Environmental Synthesis Center (SESYNC). From 2007-2014, before joining the Information School at the University of Washington, she was Director of the Center for Informatics Research in Science & Scholarship at the School of Information Sciences at the University of Illinois.

**Nic Weber**

Assistant Professor,
University of
Washington
Information School

Nic Weber is an Assistant Professor at the Information School and a member of the Technology & Social Change Group (TASCHA) and the Data Lab at the University of Washington. He received his PhD in Information Science from the University of Illinois in 2015. His dissertation—which received the Beta Phi Mu Eugene Garfield Doctoral Dissertation award—looked at the sustainability of eScience infrastructures in the field of Climate Science.

While conducting this work, Weber was named a visiting researcher at the National Center for Atmospheric Research and an early-career scholar with the Research Data Alliance (RDA).

Weber's current research focuses broadly on the design and implementation of information systems, and in particular the development of tools that enable transparency for public sector information. He is currently the technical director of the NSF-funded Qualitative Data Repository and a co-PI on the Open Data Literacy project funded by IMLS.

With TASCHA, Weber will be creating the Impact Data Trust, housing the impact data from the Internet Archive's *Open Libraries* project and that of its partners. As a trusted repository for aggregating library data while preserving the privacy of all patrons, the Impact Data Trust will allow researchers such as Weber to search for the deeper lessons that can serve the entire library ecosystem.

**Abby Smith
Rumsey**

Writer and Historian

Abby Smith Rumsey is a writer and historian focusing on the creation, preservation, and use of the cultural record in all media. She has written and lectured widely on digital preservation, online scholarship, the nature of evidence, the changing roles of libraries and archives, intellectual property policies in the digital age, and the impact of new information technologies on perceptions of history and time.

Rumsey served as director of the Scholarly Communication Institute at the University of Virginia, and has advised universities and their research libraries on strategies to integrate digital information resources into existing collections and services.

For over a decade, Rumsey worked with the Library of Congress's National Digital Information Infrastructure and Preservation Program (NDIIPP) to develop of a national strategy to identify, collect, and preserve digital content of long-term value.

Rumsey served as director of programs at the Council on Library and Information Resources and was responsible for projects that addressed the use and preservation of historical and cultural materials in all genres, formats, and media. She wrote, edited, and commissioned numerous reports on the challenges of migrating our shared intellectual and cultural heritage from paper, film, and audio formats to digital media. Her work also examines the consequences of organizational disruptions, threats of information loss, and changing conceptions about intellectual property and the value inherent in information.

Abby Smith Rumsey holds a BA from Radcliffe College and MA and PhD degrees in history from Harvard University, where she specialized in Early Modern Russia and intellectual history. She has been a Fulbright Fellow and taught at Harvard and Johns Hopkins Universities.

**Anasuya Sengupta**

Co-Founder and
Coordinator, Whose
Knowledge?

Anasuya Sengupta is co-founder and coordinator of the global campaign Whose Knowledge?, work supported by a 2017 Shuttleworth Fellowship. She has worked in India, across the Global South, and internationally for more than 20 years, leading initiatives to amplify voices from the margins in virtual and real worlds.

Her work has supported free knowledge, feminist and social justice movements, and communities of practice. Most recently, as chief grantmaking officer of the Wikimedia Foundation, she created and headed the grant-making department (now community engagement), supporting Wikimedia communities worldwide in their efforts to create and enable free and open knowledge.

Before that, Sengupta was the regional program director for Asia and the Pacific Islands at the Global Fund for Women, one of the world's largest grant-making organizations focused exclusively on women's human rights. She has led initiatives challenging violence against women and children, combating religious and cultural fundamentalism, and supporting sexual and reproductive rights and women's health.

Sengupta is the author of *Defending Our Dreams: global feminist voices for a new generation* (Association of Women's Rights in Development and Zed Books, 2006), arguably the first international anthology of young feminist analyses and experience. She is currently on the board of the *Nonprofit Quarterly* and /The Rules.

Sengupta holds an M.Phil. in Development Studies from the University of Oxford, where she studied as a Rhodes Scholar. She also has an undergraduate degree in Economics (Honours) from Lady Shri Ram College, Delhi University.



Bethany Nowviskie

Director, Digital
Library Federation

Bethany Nowviskie is director of the Digital Library Federation (DLF) at the Council on Library and Information Resources (CLIR). She also serves as research associate professor of Digital Humanities in the Department of English at the University of Virginia (U.Va.).

From 2007-2015, Nowviskie directed the Scholars' Lab and Digital Research & Scholarship Department at the University of Virginia Library. While there, she also served as special advisor to the university's provost for the advancement of digital humanities research, and as chair of the General Faculty Council. Nowviskie's past roles include serving as distinguished presidential fellow at CLIR, president of the Association for Computers and the Humanities, chair of the Modern Language Association's Committee on Information Technology, and associate director of the Scholarly Communication Institute. Her projects include:

- Neatline, toolset for geotemporal interpretation of archival collections funded by the National Endowment for Humanities (NEH) and the Library of Congress;
- the UVa Praxis Program, international Praxis Network, and #Alt-Academy collection, which address graduate education reform and alternative academic careers;
- the open-source library discovery platform, Project Blacklight;
- two NEH-funded programs: the Institute for Enabling Geospatial Scholarship and Speaking in Code, a summit on tacit knowledge exchange in software development.

Nowviskie holds a bachelor's degree in English and Archaeology (summa cum laude) from the University of Virginia, a master's in Education from Wake Forest University, and a PhD in English from U.Va., with a dissertation entitled *Speculative Computing*. *The Chronicle of Higher Education* pretty much summed her up in a "Ten Tech Innovators" profile: "Bethany Nowviskie likes to build things."

**Dan Cohen**

Vice Provost for
Information
Collaboration, Dean
of the Libraries, and
Professor of History,
Northeastern
University

Dan Cohen is vice provost for information collaboration, dean of the libraries, and professor of History at Northeastern University.

Prior to his work at Northeastern, Cohen was the founding executive director of the Digital Public Library of America (DPLA), where he worked to further the DPLA's mission to make the cultural and scientific heritage of humanity available, free of charge, to all.

At the DPLA, Cohen led Open E-books, a program with President Barack Obama and nonprofit partners that provides thousands of award-winning ebooks for free to millions of in-need children. At the Roy Rosenzweig Center for History and New Media, he oversaw projects ranging from PressForward to the September 11 Digital Archive to the popular Zotero research tool.

Cohen was an inaugural recipient, in 2006, of the American Council of Learned Societies' Digital Innovation Fellowship. In 2011, he received the Frederick G. Kilgour Award from the American Library Association, and in 2016 he was given the LITA/Library Hi Tech Award for Outstanding Communication for Continuing Education in Library and Information Science. In 2012, he was named one of the top "tech innovators" in academia by *The Chronicle of Higher Education*.

Cohen received his bachelor's degree from Princeton, a master's from Harvard, and his doctorate from Yale.

**David Rosenthal**

Chief Scientist,
LOCKSS Program,
Stanford University

Dr. David Rosenthal started the LOCKSS (Lots of Copies Keep Stuff Safe) Program, which enables long-term preservation of web published materials (ejournals, books, blogs, websites, archival materials, etc). He built and tested the initial prototype, developed the OpenBSD-based network appliance technology that LOCKSS peers used for the first five years of production, and was part of the research team that developed the award-winning fault- and attack-resistant peer-to-peer network technology that underlies the LOCKSS network. He currently works on economic models for long-term storage.

Rosenthal joined Sun Microsystems in 1985 from the Andrew project at Carnegie-Mellon University. He worked on window systems with James Gosling at Sun, and was part of the teams that developed both NeWS and the X Window System, now the open-source standard. He also worked on graphics hardware, the operating system kernel, and system and network administration.

Rosenthal left Sun in 1993 to be chief scientist and employee #4 at Nvidia, now the leading supplier of high-performance graphics chips for the PC industry. In 1996 he joined Vitria Technology, now a leading supplier of e-business infrastructure technology. There, he worked on reliable multicast protocols and on testing industrial-strength software. After starting the LOCKSS Program at Stanford with National Science Foundation funding, he brought his work on LOCKSS to Sun Labs from 1999 to 2002, before returning to Stanford Library in 2002 where he continues the work today.

Rosenthal received an MA degree from Trinity College, Cambridge and a PhD from Imperial College, London. He is the author of several technical publications and holds 23 patents. His interests include backpacking and the theater.



David Rumsey

Founder, David
Rumsey Map
Collection

David Rumsey is president of Cartography Associates, a digital publishing company based in San Francisco, and is chairman of Luna Imaging, a provider of enterprise software for online image collections. He was a founding member of Yale Research Associates in the Arts, also known as PULSA, a group of artists working with electronic technologies. He subsequently became associate director of the American Society for Eastern Arts in San Francisco.

Rumsey began building a collection of North and South American historical maps and related cartographic materials in 1980. His collection, with more than 150,000 maps, is one of the largest private map collections in the United States. In 1995, Rumsey launched the David Rumsey Historical Map Collection, www.davidrumsey.com. The free, public online website contains more than 30,000 high resolution images of maps.

In 2002, Rumsey was given an Honors Award from the Special Libraries Association for making his private map collection available to the public online. In the same year his map website won a Webby Award for Technical Achievement. The site has won numerous other web awards and has been featured in *Wired* magazine, *MIT Technology Review*, *Mercator's World* magazine, *San Francisco Chronicle*, *The New York Times*, and on TechTV.

Rumsey received his BA and MFA from Yale University where he was a lecturer at the Yale Art School. He has served on the boards of the John Carter Brown Library, the Internet Archive, The Long Now Foundation, the Stanford University Library Advisory Board, CLIR, the American Antiquarian Society, Yale Library Associates and the Samuel H. Kress Foundation.



Geoff Harder

Associate University
Librarian, Information
Resources and
Digital Initiatives,
University of Alberta

Geoff Harder is the associate university librarian for digital initiatives at the University of Alberta. The University is dedicated to the promise made by founding president Henry Marshall Tory that "... knowledge shall not be the concern of scholars alone. The uplifting of the whole people shall be its final goal." To this end, Harder leads the strategic development of the University of Alberta Libraries' digital initiatives, positioning library services and collections to support broader, more open and improved forms of access and use. Harder and the teams he works with are known for their interest and commitment to developing digital library services to support emerging needs around research data management, repositories, and preservation. To further increase capacity in these areas, he is currently leading the planning and development of a new digital scholarship centre to open in 2018 on University of Alberta's main campus.

Harder contributes to the work of many data, preservation, and research organizations, including the Consortia for Advancing Standards in Research Administrative Data (CASRAI). He is on the Board of Directors for CLOCKSS, a not-for-profit joint venture between the world's leading academic publishers and research libraries whose mission is to build a sustainable, geographically distributed dark archive with which to ensure the long-term survival of web-based scholarly publications for the benefit of the greater global research community. Harder is also on the Advisory Committee for the Public Knowledge Project (PKP), a multi-university initiative developing (free) open source software and conducting research to improve the quality and reach of scholarly publishing.

Harder has been developing the partnership between the University of Alberta and the Internet Archive since 2008.



Gerald Beasley

Carl A. Kroch
University Librarian,
Cornell University

Gerald Beasley is the Carl A. Kroch university librarian at Cornell University, a position he accepted in 2017.

Prior to his work at Cornell, Beasley was vice-provost and chief librarian at the University of Alberta, where he oversaw the second largest academic research library and archives system in Canada, as well as the University of Alberta Press, bookstores, museum collections, copyright office and Technology Training Centre.

He is an elected member of the International Federation of Libraries and Institutions' (IFLA) Academic and Research Libraries Standing Committee; chair of the Canadian Association of Research Libraries' Policy Committee; and vice-chair of the Association of Research Libraries' Diversity and Inclusion Committee. His previous library experience includes leadership positions at the Canadian Centre for Architecture, Montreal; the Avery Architectural and Fine Arts Library, Columbia University, New York; and Concordia University, Montreal. He has also worked at the Royal Institute of British Architects and the Wellcome Institute for the History of Medicine in London, England.

Beasley is a graduate of Oxford University (MA, English Lang. & Lit.) and University College, London (MA, Library Studies). He is past-president of the Canadian Association of Research Libraries (2013-2015).

**Hannah Scates Kettler**

Digital Humanities
Research &
Instruction Librarian,
University of Iowa

Hannah Scates Kettler is a digital humanities research & instruction librarian in the Digital Scholarship & Publishing Studio at the University of Iowa. She leads digital humanities projects from inception to preservation, managing the process of creation as well as providing research and development support. Her interests include issues raised by 3D creation and preservation, and she advocates for diverse representations in cultural heritage collections and digital humanities.

She is the founding member and current chair of the Digital Library Federation Cultural Assessment Interest Group, formed in February 2016 to discuss ways to assess how well digital collections represent, present, and allow for the discoverability of cultural artifacts. The Cultural Assessment group identifies institutional data and practices that may be relevant to understanding cultural assessment. Then, the group investigates underlying assumptions within these data and practices to help the community better understand the social structures that both influence cultural heritage collection work and result from it. The group strives to raise awareness of cultural bias and institutional blind spots, as well as recommend a set of data points to create more inclusive cultures within memory institutions.

Scates Kettler holds a BA from the University of Iowa in Anthropology with minors in Art History and Classics. She also holds a MA from King's College London in Digital Humanities, where she specialized in virtual cultural heritage.



Jim Fruchterman

Founder, Benetech

Jim Fruchterman is a social entrepreneur who has adapted the Silicon Valley technology approach to empower communities in need by creating scalable software to support social good solutions for accessible education, global literacy, and human rights. As a Caltech-trained engineer and veteran Silicon Valley tech entrepreneur, he was inspired to found Benetech when his venture capital investors vetoed a socially beneficial product idea.

Under Fruchterman's leadership, Benetech has created and scaled multiple software for social good enterprises and continues to develop and launch new software applications. Benetech's work in global education and literacy has transformed how a half million people with disabilities read and access information, delivered more than 10,000,000 accessible ebooks, and built an online collection of more than 500,000 titles.

Fruchterman is a MacArthur Fellow, a recipient of the Skoll Award for Social Entrepreneurship, the Outstanding Social Entrepreneur Award from the Schwab Foundation for Social Entrepreneurship, and the Migel Medal—the highest honor in the blindness field—from the American Foundation for the Blind. Fruchterman also provides thought leadership on software for social good by frequently working with technologists, for-profit companies, other nonprofits, and policy-makers to explore how software and data can better serve disadvantaged segments of humanity.



Kyle K. Courtney

Copyright Advisor,
Harvard University

Kyle K. Courtney, both lawyer and librarian, is the copyright advisor for Harvard University. Working out of the Office for Scholarly Communication, Courtney works to establish a culture of shared understanding of copyright law within the Harvard community and beyond. He also serves as copyright and information policy advisor for HarvardX/edX, and he continues to teach first year legal research sessions through Harvard Law School's Legal Research & Writing Program. The State Copyright Resource Center, part of Courtney's "Copyright First Responders" initiative, was profiled in *Library Journal* in 2013, and he was named a National Library Mover & Shaker in 2015.

Courtney co-founded Fair Use Week in 2014, which is now an international annual celebration sponsored by more than 140 universities, libraries, and other institutions. In 2016 he won a Knight Foundation grant to develop technology for crowdsourcing copyright and fair use assessments. He runs a copyright law consulting practice for libraries, higher education institutions, non-profit groups, and specialized archives. He has a dual appointment at Northeastern University as a faculty scholar for the Program on Human Rights and the Global Economy (PHRGE) at the School of Law and is in his tenth year of teaching "Cyberlaw: Privacy, Ethics, and Digital Rights" for the interdisciplinary Information Assurance Program at the College of Computer and Information Science. He holds a JD with distinction in Intellectual Property/High Technology Law and an MSLIS.

He is a published author and nationally recognized speaker on the topics of copyright, technology, libraries, and the law. His writing has appeared in *Politico*, *Slate*, *Library Journal*, and other publications. His most recent book is *MOOCs and Libraries in the 21st Century* (Rowman & Littlefield Ltd., 2015.)



Lawrence Wilkinson

Chairman, Heminge
& Condell

Lawrence Wilkinson is chairman of Heminge & Condell (H&C), an investment and strategic advisory firm, and co-founder of Global Business Network (GBN). Through H&C, Wilkinson is involved in venture formation work, and serves as a director and counselor to several companies that he helped create. At the same time, Wilkinson continues to offer strategic counsel to a number of organizational clients and governments around the world. Wilkinson is a widely consulted and cited authority on strategic issues; a frequent speaker in academic, industry, and corporate settings; and works with a variety of not-for-profit organizations.

In 1987, Wilkinson co-founded GBN, a strategic consulting firm, where he served as president through 1998 and helped pioneer the use of scenario planning for organizations. His clients have included Harvard University, Oxford University, University of California/UC Press, O'Reilly Media, Apple, Google, IBM, Intel, Microsoft, AT&T, Verizon, The Walt Disney Co, The Capital Group, The Coca-Cola Co., NPR, CPB, BBC, the World Bank, The World Trade Organization, the World Economic Forum, and the governments of the United States, the United Kingdom, Mongolia, and Singapore. Wilkinson has authored several of the GBN Scenario Books, led GBN's work on the Future of R&D, and has designed and directed or co-directed several of GBN's major meetings.

Wilkinson graduated with honors from Davidson College, Oxford University, and Harvard Business School. He is an advisor to The Dalai Lama Fellows Program and The Library of the Future Project at The Bodleian Library, Oxford, an advisor and Visitor at the Harvard University Library, and is a Fellow of the MIT Center for Transportation and Logistics.



Lisa Petrides

Founder and CEO,
Institute for the Study
of Knowledge
Management in
Education

Lisa Petrides, PhD is founder and CEO of the Institute for the Study of Knowledge Management in Education (ISKME), an independent, education nonprofit established in 2002, and a pioneer in knowledge sharing and innovation in the education sector.

Petrides is a scholar and international open educational resources (OER) expert who has helped lead the development of tools and strategies to create and support the field of open educational practice. Her work includes the creation of the award winning OER Commons, a digital public library of open educational resources. This collaboration platform enables users to discover and improve high-quality digital resources that are free, openly licensed, and available for a diverse range of learners. She has advised foreign governments and U.S. government agencies, states, schools, and colleges on implementing OER at all levels. ISKME also produces an international event dedicated to catalyzing education innovation, Big Ideas Fest.

A former professor in the Department of Organizational Leadership at Columbia University, Teachers College, her research has been at the forefront of understanding how education can be made relevant to learning through open access, social learning, information sharing, and knowledge collaboration.

Petrides has led development efforts that have enabled schools, colleges, universities, ministries of education, and support organizations to expand their capacity to collect and share information. She received an MBA from Sonoma State University, and a PhD in Education Policy from Stanford University.



Martha Kanter

Executive Director,
College Promise
Campaign

Dr. Martha Kanter leads the College Promise Campaign's national initiative to increase college access, affordability and completion in American higher education. She is also a senior fellow at New York University's Steinhardt Institute for Higher Education Policy. She specializes in policy efforts to identify innovative education interventions, financing models, and behavioral incentives at the local, state and national levels to raise America's high school and college graduation rates from two- and four-year colleges and universities. Her academic interests include: The Confluence of Access, Equity and Excellence; The Intersection of Policy and Politics in American Higher Education; and The Contributions of America's Community Colleges to the Nation's Social Fabric, Civic Future and Economy.

In 2009, President Barack Obama nominated Kanter to serve as the U.S. Under Secretary of Education, with oversight responsibility for all federal postsecondary statutory, regulatory, and administrative policies and programs for the U.S. Department of Education. From 2009-2013, Kanter and her team took bold steps to increase college access, affordability, quality, and completion to implement President Obama's goal to have the best educated, most competitive workforce in the world by 2020. She oversaw the successful implementation of the Direct Student Loan program that resulted in a 50-percent increase in college enrollment of low-income students, growing from six to more than nine million Pell Grant recipients. Previously, Kanter served as president of De Anza College and then chancellor of the Foothill-De Anza Community College District for sixteen years. She began her career as an alternative high school teacher. She holds a BA degree in Sociology from Brandeis University, an MEd from Harvard University, and an EdD from the University of San Francisco.

**Michelle M. Wu**

Associate Dean and
Professor of Law,
Georgetown
University Law
Center

Michelle M. Wu is the associate dean for library services and professor of law at Georgetown University Law Center. She has served in this role since 2010, mapping a strategic course for the management and use of legal information, as well as teaching in the areas of copyright and copyright licensing. She has also served as acting associate dean for administration and finance and acting head of human resources.

Prior to joining Georgetown, Wu worked for Hofstra University as associate dean for information services, professor of law, and interim senior vice dean for academic affairs. As part of the law school's leadership team, she served as a key player in strategic planning and helped to build the infrastructure necessary for a law school in a period of transition. Wu also served as the associate director and then acting law library director for the University of Houston Law Center.

Wu is a frequent speaker on library and information management and has written widely on these topics as well as copyright. Her publications include *Technology and Future Directions for Law Libraries*; *Building a Collaborative Digital Collection: A Necessary Evolution in Libraries*; *Collaborative Academic Library Digital Collections* Post-Cambridge University Press, *HathiTrust and Google Decisions on Fair Use*; and *Food for Thought: Should Libraries Partner with Nonlibrary Search Engine Providers for Their OPACs and Discovery Layers?*

Wu received her Bachelor of Arts degree in Psychology from the University of California, San Diego, her JD from California Western School of Law, and her MLibr. from the University of Washington.

**Mike Furlough**

Executive Director,
HathiTrust Digital
Library

Mike Furlough is executive director of HathiTrust, an organization dedicated to collecting and preserving the scholarly and cultural record. Furlough oversees the full suite of its programs and services, which include a trusted digital library holding more than 15 million digitized books, providing collections access for print disabled users, large-scale copyright research and investigation, innovative support for text and datamining, and the establishment of a distributed print archive among its members.

Prior to joining HathiTrust, Furlough was the associate dean for research and scholarly communications at the Pennsylvania State University Libraries, where he established new programs to ensure the preservation and curation of original scholarship as well as traditional collections. In his roles at the University of Virginia Library, Furlough developed and led digital scholarship services that supported researchers in the sciences, social sciences, and in the then-emerging field of digital humanities.

His research and publications have focused on how libraries and universities develop new organizational supports for changing scholarly communication practices. *Getting the Word Out: Academic Libraries as Scholarly Publishers*, which he co-edited with Maria Bonn, was published by the Association of College and Research Libraries in 2015. From 2011 to 2013, he was a member of the faculty of the E-Science Institute, sponsored by the Association of Research Libraries, the Digital Library Federation, and Duraspace. He sits on the board of directors of the Digital Preservation Network and is a member of The Future of the Print Record working group sponsored by the Modern Language Association and American Historical Association. Before he ran away to join the library, Furlough studied American Literature at the University of Virginia.

**Nirmita Narasimhan**

Policy Director,
Centre for Internet
and Society

Nirmita Narasimhan is a policy director with the Centre for Internet and Society, working in the areas of policy research and advocacy related to technology access for persons with disabilities. She was involved in drafting the Indian National Universal Electronic Accessibility Policy and also worked closely with different departments of the government of India to bring accessibility into their policies and programmes.

Narasimhan has authored several reports on accessibility that are being used by policymakers worldwide. She has also presented papers on Information and Communication Technologies and Accessibility at conferences such as the Internet Governance Forum (IGF) and is the director, global reports, for G3ict. She has also participated in the World Blind Union Treaty negotiations at the World Intellectual Property Organization.

Narasimhan has won several awards for her work, including the National Award for Empowerment of Persons with Disabilities, which she received from the president of India in December 2010. Her educational background includes degrees in Law, German and Music.

**Pamela Samuelson**

Richard M. Sherman
Distinguished
Professor of Law
and Information at
the University of
California, Berkeley

Pamela Samuelson is the Richard M. Sherman distinguished professor of law and information at the University of California, Berkeley. She is recognized as a pioneer in digital copyright law, intellectual property, cyberlaw, and information policy. Since 1996, she has held a joint appointment at Berkeley Law School and UC Berkeley's School of Information. Samuelson is a director of the Berkeley Center for Law & Technology, and she has written and published extensively in the areas of copyright, software protection and cyberlaw. She serves on the board of directors of the Electronic Frontier Foundation and the Electronic Privacy Information Center, as well as on the advisory boards for the Center for Democracy & Technology, Public Knowledge, and the Berkeley Center for New Media.

For more than 20 years, Samuelson has been a contributing editor of *Communications of the ACM*, a computing professionals journal respected for its coverage of existing and emerging technologies, for which she has written more than 60 "Legally Speaking" columns. From 1997 through 2002, Samuelson was a fellow of the John D. & Catherine T. MacArthur Foundation. She is also a fellow of the Association of Computing Machinery. The Anita Borg Institute honored Samuelson with its Women of Vision Award for Social Impact in 2005, and the public interest organization Public Knowledge awarded her its IP3 Award for her contributions to Internet law and policy in October 2010.



Paula MacKinnon

Interim Director,
Califa Group

Paula MacKinnon is interim director of Califa Group (califa.org), a nonprofit library consortium of more than 220 libraries, the largest library network in California. Founded in 2004, Califa manages statewide and national grant projects that benefit the library community; brokers library product and service agreements; advocates with publishers and vendors on behalf of libraries; operates the enki Library (enkilibrary.org) ebook platform, the first and only ebook platform to support library ebook ownership; and provides library Continuing Education and Professional Development training through the Infopeople project (infopeople.org).

In 2016, MacKinnon was awarded the California Library Association Technology Professional Award. Her recent projects include award-winning library services Discover & Go, a downloadable museum pass platform for California libraries; LiveChat, an eGovernment Customer Relationship Management service provided by the Library; enki Library, a California ebook platform that makes ebook ownership a reality for libraries; and Snap & Go, a smartphone application that uses QR codes to put library service, literally, into the hands of commuters.

MacKinnon holds a master's degree in Library Science from Dalhousie University, Canada.

**Peter Jaszi**

Emeritus Professor,
American University,
Washington College
of Law

Peter Jaszi is an emeritus professor at American University Washington College of Law who writes and lectures about copyright law in historical and cultural contexts. At American, he was a founder of the Glushko-Samuelson Intellectual Property Law Clinic and the Program on Intellectual Property and Information Justice. Having served as a trustee of the Copyright Society of the U.S.A., Professor Jaszi remains a member of its journal editorial board.

With Craig Joyce, Marshall Leaffer and Tyler Ochoa, he co-authors a standard copyright textbook, *Copyright Law* (Lexis, 7th ed., 2006). Alone and with Martha Woodmansee, he has written several articles on copyright history and theory; together they edited *The Construction of Authorship*, published by Duke University Press.

In 1994, Professor Jaszi was a member of the Librarian of Congress' Advisory Commission on Copyright Registration and Deposit, and in 1995 he was an organizer of the Digital Future Coalition. In 2007, he received the American Library Association's L. Ray Patterson Copyright Award, and in 2009 the Intellectual Property Section of the District of Columbia Bar honored him as the year's Champion of Intellectual Property.

Since 2005, Professor Jaszi has been working with Professor Patricia Aufderheide of the American University's Center for Social Media on projects designed to promote the understanding of fair use by documentary filmmakers and other creators. In 2006-07, he led an interdisciplinary research team, funded by the Ford Foundation, which investigated the connections between intellectual law and the traditional arts in Indonesia. Professor Jaszi also serves as the Intellectual Property Scholar of the Center for Intellectual Property at the University of Maryland University College.



Susan Hildreth

Practitioner in
Residence, University
of Washington
Information School

Susan Hildreth is the inaugural, Gates-funded distinguished practitioner in residence (professor of practice) at the University of Washington Information School in Seattle. She recently stepped down as the executive director, Peninsula Library System, Pacific Library Partnership and the Califa Group. She also serves as an Aspen fellow in the Communications and Society Program at the Aspen Institute, advancing the work of the Dialogue on the Future of Public Libraries. In June 2016, she began a three-year term as the treasurer of the American Library Association.

She served as the director of the Institute of Museum and Library Services, a presidentially appointed, Senate confirmed position, from January 2011 through January 2015. Hildreth is the former city librarian of Seattle, where she managed the Seattle Public Library. Hildreth has also served as the state librarian of California, appointed by California Gov. Arnold Schwarzenegger. She also served as the city librarian of the San Francisco Public Library and in other leadership positions in California public libraries. She began her career as a branch librarian in the Edison Township, NJ, public library system.

Hildreth graduated cum laude from Syracuse University and holds a master's degree in Library Science from the State University of New York at Albany and a master's degree in business from Rutgers University.



Victoria Reich

Executive Director,
LOCKSS Program,
Stanford University

Victoria Reich is executive director of the LOCKSS (Lots of Copies Keep Stuff Safe) Program, Stanford University Library. The LOCKSS Program empowers local and national communities to ensure perpetual access to a wide range of materials, including for-fee and open access books and journals. In a 2014 audit, the LOCKSS technology received the first ever perfect score in the “Technologies, Technical Infrastructure, Security” category.

Reich has extensive library experience, having held positions at Stanford University Libraries, the U.S. National Agricultural Library, the Library of Congress and the University of Michigan. She was also instrumental in founding the CLOCKSS Archive and HighWire Press.



Vint Cerf

Vice President
and Chief Internet
Evangelist, Google

Vinton Gray Cerf is an American internet pioneer, who is recognized as one of “the fathers of the internet,” sharing this title with TCP/IP co-inventor Bob Kahn. His contributions have been acknowledged and lauded, repeatedly, with honorary degrees and awards that include the National Medal of Technology, the Turing Award, the Presidential Medal of Freedom, the Marconi Prize and membership in the National Academy of Engineering.

In the early days, Cerf was a manager for the United States’ Defense Advanced Research Projects Agency (DARPA), funding various groups to develop TCP/IP technology. When the Internet began to transition to a commercial opportunity during the late 1980s, Cerf moved to MCI where he was instrumental in the development of the first commercial email system (MCI Mail) connected to the Internet. In 2005 he left MCI to become vice president and “chief Internet evangelist” at Google Inc.

Cerf is active in many organizations that are working to help the internet deliver humanitarian value in our world today. He is supportive of innovative projects that are experimenting with new approaches to global problems, including the digital divide, the gender gap, and the changing nature of jobs.

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Footnotes – by section

A. Overview

Executive Summary

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Location for Proposed project

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<http://blog.archive.org/2017/05/30/mit-press-classics-available-soon-at-archive-org/>

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C. Scalability of the Project

Planning for Scale

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<http://www.worldblindunion.org/English/our-work/our-priorities/Pages/default.aspx>

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<https://www.imls.gov/sites/default/files/publications/documents/plsfy2013.pdf>

[5]

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<http://blog.archive.org/2014/10/28/building-libraries-together/>

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OCLC “*In support of library funding*” (2017)

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Internet Archive's Library of 2020, "Advanced Reading"
<http://library2020.blog.archive.org/learn-more/>

Support for the Change (no footnotes)

Advantage of the Proposed Solution to Alternative Solutions and to the Status Quo

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<https://www.amazon.com/BiblioTech-Libraries-Matter-More-Google/dp/0465042996>

Ease of Transferring and Applying the Solution at Scale

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Organizational Capacity to Implement the Solution at Scale (no footnotes)

Financial Sustainability of the Proposed Solution (no footnotes)

D. Monitoring, Evaluation, and Learning

Results

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American Library Association, "*ALA Library Fact Sheet 6*"
<http://www.ala.org/tools/libfactsheets/alalibraryfactsheet06>

Tracking

(no footnotes)

Milestones

(no footnotes)

Changes for Beneficiaries

(no footnotes)

Data Sources

(no footnotes)

Methodology

(no footnotes)

Gender Analysis

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Global Partnership for Education, "*All Children Reading: A Grand Challenge for Development*" (2014)

<http://www.globalpartnership.org/blog/all-children-reading-grand-challenge-development>

[2]

Anasuya Sengupta (Founder, Whose Knowledge?), from a letter of support (June 28, 2017)

Findings

(no footnotes)

Dissemination

(no footnotes)

E. ADDITIONAL INFORMATION**Detailed Budget Narrative**

(no footnotes)

Detailed Budget**Income Statement**

Project Risk Management

[1]

Authors Guild, Inc. v. HathiTrust

<https://www.courtlistener.com/opinion/2677701/authors-guild-inc-v-hathitrust/>

University Press et al. v. Patton et al.

<http://www.arl.org/focus-areas/court-cases/106-cambridge-press-v-georgia-state-university>

[2] Section 121 of the US Copyright Act.

[3] Authors Guild, Inc. v. HathiTrust, 755 F. 3d 87 (2nd Cir. 2014)

[4] Authors Guild, Inc. v. HathiTrust, 755 F.3d 87 (2d Cir. 2014)

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[5] Authors Guild v. Google, Inc., 804 F.3d 202 (2d Cir. 2015)

[6] Authors Guild v. Google, Inc., 804 F.3d 202 (2d Cir. 2015)

[7] Section 121 in U.S. copyright law.

F. Financial

Financial Strength and Stability

(no footnotes)

G. Technical

Technical Explanation

[1]

17 U.S.C. §108 and 17 U.S.C. § 121.

[2]

“In determining whether the use made of a work in any particular case is a fair use the factors to be considered shall include— (1) the purpose and character of the use, including whether such use is of a commercial nature or is for nonprofit educational purposes; (2) the nature of the copyrighted work; (3) the amount and substantiality of the portion used in relation to the copyrighted work as a whole; and (4) the effect of the use upon the potential market for or value of the copyrighted work.” 17 U.S.C. § 107.

[3]

See e.g., *Authors Guild, Inc. v. HathiTrust*, 755 F.3d 87 (2d Cir. 2014).

[4] The first sale right is codified, in part, at 17 U.S.C. § 109.

[5] See e.g., *Mattel Inc. v. Walking Mountains Prods.*, 353 F.3d 792, 803 (9th Cir. 2003), *Cambridge University Press v. Patton*, 769 F.3d at 1270.

[6] *Campbell v. Acuff-Rose Music, Inc.*, 510 U.S. 569, 586 (1994).

[7]

For example:

- the creation of accessible versions of works for the print disabled in *Authors Guild, Inc. v. HathiTrust*, 755 F.3d 87, 98 (2d Cir. 2014); and
- time shifting and space shifting of entertainment content in *Sony Corp. of Am. v. Universal City Studios, Inc.*, 464 U.S. 417 (1984) and *Recording Industry Ass’n of Am. v. Diamond Multimedia Sys., Inc.*, 180 F.3d 1072, 1079 (9th Cir. 1999).
- reverse engineering of software to achieve interoperability in *Sega v. Accolade*, 977 F.2d 1510 (9th Cir. 1992), *Atari v. Nintendo*, 975 F.2d 832 (Fed. Cir. 1992), and *Sony v. Connectix*, 203 F.3d 596 (9th Cir. 2000);
- the operation of search engines in *Authors Guild, Inc. v. Google*, (2d Cir. 2015), *Authors Guild, Inc. v. HathiTrust*, 755 F.3d 87, 98 (2d Cir. 2014), *Kelly v. Arriba Soft*, 336 F.3d 811 (9th Cir. 2003), *Perfect 10 v. Amazon.com*, 508 F.3d 1146, 1166 (9th Cir. 2007), and *Field v. Google*, 412 F. Supp. 2d 1106 (D. Nev. 2006);
- the operation of plagiarism detection software in *A.V. v. iParadigms, LLC*, 562 F.3d 630 (4th Cir. 2009); and
- the recognition of images as historical artifacts in *Bill Graham Archives v. Dorling Kindersley Ltd.*, 448 F.3d 605 (2d Cir. 2006).

[8]

See e.g., *Campbell*, 510 U.S. at 591, *Bill Graham Archives*, 448 F.3d at 615; *New Era Publications*, *Mattel v. Pitt*

[9]

Bobbs-Merrill Co. v. Straus, 210 U.S. 339 (1908).

[10]

Kirtsaeng v. John Wiley & Sons, 133 S. Ct. (pick either U.S. or S. Ct. but don’t use both) 1351, 1371 (2013).

[11]

17 U.S.C. § 109. For another example, the sale of a used book clearly cuts into sales of the original book, but this market harm is allowed under the first sale right.

[12]

Wu, Michelle M., Collaborative Academic Library Digital Collections Post-Cambridge University Press, HathiTrust and Google Decisions on Fair Use (2016). Journal of Copyright in Education and Librarianship, Volume 1, Issue 1. Available at SSRN: <https://ssrn.com/abstract=2838898>

[13]

Authors Guild v. Google, Inc., 804 F.3d 202 (2d Cir. 2015). (“If the [HathiTrust] library had created its own digital copy to enable [fair uses] the making of the digital copy would not have been infringement. Nor does it become an infringement because, instead of making its own digital copy, the library contracted with Google that Google would use its expertise and resources to make the digital conversion for the library’s benefit”).

Other

[1]

Jill Lepore, “*The Cobweb Can the Internet be archived?*” The New Yorker (January 26, 2015) <http://www.newyorker.com/magazine/2015/01/26/cobweb>